



# HARVARD LAW SCHOOL

## Executive Education

### HLS CASE DEVELOPMENT AND DISTRIBUTION

Leadership in Law Firms – Case Study

## **Innovations In Legal Consulting: Patrick J. McKenna**

### **DESCRIPTION:**

Over a three-decade career, Patrick McKenna's introduces innovations to the legal profession, which help him grow his firm to one of the top three legal consulting firms in North America. Having three times successfully introduced innovative products to the profession, McKenna launches a new initiative designed to provide external advisory boards for law firm managing partners. Despite positive feedback, the initiative falls dramatically short of expectations. McKenna must now decide what actions to take.

The case allows us to discuss how professional service firms can develop and market new innovations.

### **Subjects Covered:**

Careers & career planning, Innovations in consulting, Packaging knowledge, Marketing professional services, Managing partner behavior.

### **Questions:**

1. What did McKenna do well in his career that enabled him to successfully grow his business?
2. How successful was he at identifying and pursuing new opportunities?
3. What methods did McKenna use to build his and Edge's brand and profile?
4. What were the causes of the ENABLE project not taking off as well as previous innovations? What should he do next?

Patrick McKenna hung up the phone and looked out the window. Though it was a sunny day outside McKenna's mood was anything but bright. Over the last six months he had dedicated much of his time to creating a project that he believed could have major benefits for law firms throughout North America. He had observed that a substantial number of experienced managing partners were now retiring from top U.S. law firms and being replaced by less experienced successors. He believed that with his strong connections in the profession, there was an opportunity to create impartial, 'boards of advisors' that could help guide these new managing partners. He tested the idea with a number of respected firm leaders who all responded positively. McKenna already had a track record of success in bringing innovative products to the law industry and was quietly confident that this one could have even more impact than his previous initiatives.

From late 2009 to mid 2010 he and a colleague contacted over 100 law firm leaders to test their interest in creating their own personal advisory board. Every leader contacted thought the idea was an excellent initiative, but not one of them signed up. The project was a complete 'bust'. McKenna knew that something about the initiative had missed the target, but he was not sure what. As he sat at his desk, he retraced his steps and wondered what had gone wrong and what he should do next.

## **History**

McKenna began his career in management consulting in 1982. He had previously been the Vice-President of a major Canadian cable television and broadcasting company with operations in Western Canada and the United States. As an officer and director, his mandate included having responsibility for the Strategic Planning, Corporate Affairs, Human Resources and Legal departments within the corporation. While climbing the corporate ladder, he had been introduced, by a close friend and former classmate to a old and respected public relations firm that was in dire financial difficulty. Jumping at what he perceived to be a novel challenge, he spent many evenings and weekends working with the firm to turn it around and get it back on a growth path. He found the experience exciting, and ultimately rather lucrative as he had been remunerated in P.R. company stock.

It was at that point that McKenna decided that perhaps it was time to explore a new frontier. Though he knew there were risks to setting up a consulting operation on his own he was young, self-confident and believed that if he didn't do it now he probably never would. In 1982, he incorporated Edge Consulting Associates Inc. He chose the name 'Edge' because he believed it would be both memorable as well as convey the value he wanted to provide to clients.

He decided early on, as a consultant, that he would benefit from building expertise in an area where there was little competition. He read with interest the only article on marketing professional services in the Harvard Business Review, written by Professor Philip Kotler. As he scanned the market he noticed that the professional services sector was completely ignored by the traditional management consulting industry. McKenna saw professional services as a new and distinctive field and one in which he could build his future.

Initially he was happy to work with any and all professional services firms and secured projects with a diverse range of clients including architects firms, accountants and a family counseling practice.

In 1983, he conducted a strategic planning workshop for the Canadian Bar Association. A few days later his phone began to ring with invitations from law firms throughout Western Canada. While his expertise was largely in management and strategic planning, when he looked at law firm operations, he realized that he could add the most value in helping them with their business development. At this time 'marketing' for law firms was a relatively new idea, and a term not used amongst traditional lawyers; so McKenna positioned his service as helping these firm with their 'client relations'.

Having found his niche McKenna set himself the goal of becoming the pre-eminent player in providing marketing and strategic counsel to Canadian law firms.

For the next few years, he provided law firms with ongoing counsel on a monthly retainer-fee basis and developed clients throughout Alberta (Edmonton and Calgary) and British Columbia (Vancouver). With the advent of new regulations allowing lawyers to more aggressively market and advertise their practices, McKenna saw a new opportunity in helping law firms start to advertise their services. His firm was the first to write and produce advertising campaigns in print, radio and television mediums on behalf of law firms in Canada. Entitled, *Making The Law Understandable®*, McKenna created a series of 20 different one-minute informational television advertisements, constructed to represent public service announcements and scheduled to follow the local evening newscasts.

The television advertising proved a success and greatly increased name recognition for the firms involved, but with the increased demand a new problem surfaced. While the firms were receiving numerous calls from prospective clients, the number of active files being opened by the lawyers was miniscule. McKenna witnessed yet another opportunity open up. Looking into the issue he discovered that many lawyers weren't sure how to deal with prospective clients; some quoted fees over the telephone, others provided legal advice without knowing the full facts of the matter and most didn't know how to ask for a retainer. It became clear that some hands-on training of these lawyers was urgently needed.

### **The Packaging of Intellectual Knowledge**

In 1986, McKenna created a series of lunchtime training modules focused on teaching lawyers client relationship skills. While McKenna initially found the project fun, he soon realized how labor-intensive training could be. Rather than continue to deliver face-to-face workshops for the lawyers, McKenna decided to create a video-based training program entitled *Rainmaking®*.

The program covered twelve different skills topics each with its own 8-minute video demonstration, participant workbook and leader's guide. A train-the-trainer session was sold to firms along with a license agreement that allowed them to utilize the program within their offices. Each firm paid an initial acquisition fee (\$12,000) together with a modest (\$1,000) license fee for each year that they chose to continue using the materials. If they decided to cancel their use of the program they were contractually obligated to return all materials. This became the first ever video-based tool for training lawyers in client relations and business development skills.

The *Rainmaking®* program allowed law firms to do for themselves (with some preparatory training), that which they would otherwise need to hire an outside expert to do for them. From a personal perspective, McKenna was excited by the potential that *Rainmaking®* had

to develop his own practice. He strongly believed that this ‘product’ model was a form of leverage that was far superior and more lucrative than simply adding bodies to sell or deliver the training – all of which were hugely labor intensive and highly risky if you hired the wrong individual.

As the demand for the program grew, McKenna decided to add a partner to the firm and in 1988 brought on a former Canadian law firm managing partner Gerry Riskin. To sell the program, McKenna and Riskin called upon managing partners directly and before too long had *Rainmaking*® user firms throughout the United States. At its peak over 300 law firms were using the product and McKenna found himself traveling extensively to demonstrate and install new programs.

McKenna explained:

*Rainmaking allowed me to make contact with law firms and managing partners that I would never, otherwise, get an audience with. That contact then provided the means of establishing a personal relationship and my being engaged to do other consulting work. The challenge was to balance how much hands-on consulting work I could afford to take without ignoring the opportunity window that was available for selling and delivering the program. I knew that the program had a specific shelf-life, irrespective of our continuing to provide updates, and that it would eventually reach its point of market saturation.*

The reputation of the company continued to expand and in 1994, Edge (two Canadians) were identified in an independent survey conducted and published by Prentice Hall Law & Business, as “the #1 most popular marketing consultants amongst the largest law firms throughout the United States.”

While things looked positive on many fronts, McKenna started to notice some alarming trends. As law firms began to focus their attention on marketing, they started hiring marketing directors. These marketing directors had neither a career ladder available to them, nor did they have any ownership in supporting the *Rainmaking*® program. McKenna believed that two things were going to occur. One, was that many of these marketing people would unconsciously sabotage the continued use of *Rainmaking*® in their firms. The second was that after spending a number of unfulfilled months trying to determine what the lawyers in the firm wanted them to accomplish, they would jump to another firm to enhance their resumes and ultimately become marketing consultants to the profession. Rather than try to compete in an increasingly crowded niche, he decided that it was time to gradually ‘sunset’ the *Rainmaking*® program and begin to look for new opportunities.

### **A Portfolio of Businesses**

After studying the practices of law firms, McKenna believed his next opportunity lay in the way firms coordinated their marketing efforts. Traditionally, law firms had not differentiated between the different types of practices within the firm. The individual practices were viewed as making up one homogenous entity, which could all, share the same generic marketing plan. McKenna disagreed strongly with this viewpoint. He had long preached to managing partners that they were actually managing a portfolio of different businesses and that the way in which you might grow an employment practice was entirely different from the way you might grow a securities practice.

McKenna began work with several progressive firms where he helped the individual practice groups within the firm to develop their own customized, marketing initiatives. He noted, that while the practices were filled with bright, autonomous, self-starting professionals, they had great trouble coordinating their efforts. It became clear to both him and his clients, that if you were going to bring people together to do collaborative marketing, then someone was going to have to ‘manage these folks’. But who? And how?

Initially the firms used McKenna as a surrogate practice leader. He was running the meetings, coordinating the people and driving the results. But as the demands on his time grew, he started to think back to the success he had created with the *Rainmaking*® program. He looked around the market and saw that no one had yet introduced any substantive practice group management methods. He wondered if he could turn his practical knowledge of how to run a practice group into a product he could sell.

In 1995 he initiated a contractual relationship with David Maister, the highly regarded author and consultant, whom he had gotten to know and had collaborated with in the past. With the idea of once again “packing intellectual knowledge” into a proven product, the pair worked together to develop *PracticeCoach*®, a tool which would show practice group managers how to lead their practices. Maister and McKenna developed the written materials for the practice leaders and their group members and produced a 20-minute instructional video for each of the different topics. The program comprised twenty-seven different modules designed to be utilized by the practice group leader during their regular monthly luncheon meetings with members of their groups.

The topics covered everything from charting your future direction, to how to build a healthy practice and how get better business through collaborating as a team. The program was once again marketed to managing partners and turned into another success with both law, and accounting firms signing up.

The terms of the program stipulated that clients would pay a monthly license fee which gave them permission to use all of the materials across their practices and across their various offices. They were free to cancel their license whenever chose. McKenna and his partners soon found themselves marketing the product to firms around the world.

McKenna worked out that selling *PracticeCoach*® was, like all good marketing efforts, largely a numbers game and that the following ratios usually applied; 20 phone calls to managing partners, led to 12 meetings, which resulted in 4 paid sample sessions of the program<sup>1</sup> and ultimately 3 sales.

The program became such an effective way for McKenna and his partners to leverage their time that they decided they had to be careful about taking on too many traditional consulting projects.

McKenna explained:

*We realized that PracticeCoach® was an efficient way for us to provide value without having to be in the room. Because consulting was so labor intensive, we became very*

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<sup>1</sup> McKenna found that if he could get the managing partner to agree to him running a sample session for some of the key influencers in the firm, they would be won over by the value of the content and experience, and he would invariably make the sale.

*selective about any consulting assignments we would accept. We tried to use a ratio for our time of 2/3 program sales and support, 1/3 consulting. In the end I would only take on assignments that I believed would be very valuable learning experiences.*

Between late-1996 (when it was officially launched) and 2004, over 150 firms from four continents signed up to use the program. In 2002, due to the success of their working relationship, McKenna and Maister decided to capture and extend many of the ideas in the program into a book which they called, *First Among Equals: How To Manage A Group of Professionals*. The book went on to sell over 80,000 copies and in turn produced a new wave of clients who were interested in using their services.

## **Growing the Brand**

McKenna knew that he could not rely on the product-approach forever. He had noticed that most products and programs had a life cycle of about seven years, after which they started to lose their freshness. In any case he now felt financially secure and was keen to put more focus into his original passion of face-to-face consulting. Since the success of Rainmaking® and PracticeCoach® had allowed Edge to build a recognized brand name within the legal profession, he also felt the time was right to grow the firm's consulting resources.

In 2000, the partners changed the name of the firm to Edge International to reflect the global nature of their clientele. Between 2000 and 2006 the firm grew from two principals and one associate to eight principals and two associates in offices across five countries. While the product sales (PracticeCoach®) still continued with one individual dedicating his complete energies to the effort, the remaining principals focused completely on providing consulting services in management and strategic counsel to major law firms.

In order that the principals stay connected, McKenna arranged methods to stay in touch:

*Although we were spread across a number of geographies, we knew that we really needed to meet face-to-face on a regular basis and keep learning from each other. So we made it a consistent practice to gather together every four months and spend two day, one on business matters and the second on professional development. In these meetings each of our principals was required (non-negotiable) to present, for 90-minutes, on something they learned while working with their clients that may be of benefit to the others. In that way, we attempted to imbue an 'Edge Way' to handling our client assignments that was consistent from partner to partner.*

At the same time, McKenna kept building the awareness of the company by publishing articles on topics that he believed managing partners would want to read. Though the Internet was becoming a popular means for publishing, McKenna believed that his target market, managing partners, were much more likely to read something if it came across their desk on paper. Thinking that the Edge brand could be differentiated even further if it created its own magazine publication, McKenna converted his periodic mailing of individual articles into *International Review*. This glossy journal identified major issues facing law firm leaders and attempted to provide a pragmatic course of action to address them. *International Review* was mailed three times per year to over 2,000 managing partners around the world.

McKenna's ongoing brand building paid off. In 2002, *Of Counsel, The Legal Practice and Management Report* stated that according to their survey results: "When asked to name the consultants that they had used most often, managing partners cited Edge International as one of the Top Three most popular firms."

Among the issues that grabbed McKenna's attention was discovering that most new managing partners taking office had little formal training in what would be expected of them as their firm's new leader. Following on an assignment to help a 450-lawyer firm select their next managing director, McKenna launched a research study that culminated in a widely-quoted 2004 article entitled: *A Profile of Today's Managing Partner*.

Based on his research and knowledge of what it took to be a successful managing partner, McKenna then wrote an eBook titled: *First 100 Days: Transitioning A New Managing Partner*. The book included the views and recommendations of over 20 experienced firm leaders and used a new technology, which made the online book look like a fancy digital publication, thus giving it a more readable, professional look. The book took off, with 4,000 copies being downloaded in 86 countries within the first four months. McKenna received a call from Ark Conferences to ask if he would be interested in creating a one-day master class for new firm leaders, to be held at The University of Chicago, and building upon the key messages contained in his e-book.

## **New Beginnings**

McKenna continued to be interested in how best to help new managing partners make the transition. He discovered through his own research that less than 9% of firms had any kind of formal succession plan in place. He found that a new managing partner usually received no training, no direction and little if any guidance or mentoring when taking on the new role. But he could also see that the challenge for the managing partner did not end there. Once in the role many reported to him, when attending his master class, that they had no one they could speak to about their firm's issues.

As one managing partner conveyed it,

*We have no confidants. We go to conferences or other meetings with fellow managing partners to share and talk about the challenges we all have. But we don't really talk about our problems. Who wants to admit that they have this problem partner who frustrates the hell out of them or that they don't really know how to effectively handle a particular issue within their firm. For one thing we are all competitors, but more importantly, no one wants to look incompetent amongst their peers.*

McKenna believed he could offer firms an innovative new solution to this challenge if he could gather together a specialized group of external advisors and consultants. He was however, concerned about potential conflicts of interests this might create with his Edge partners. While his wife wondered if this was the time for him to go on a few cruises and start taking life easy, McKenna wondered if this was the time to once again go solo.

In 2008, twenty-five years after founding Edge consulting, McKenna decided to withdraw from the firm he founded and pursue these new opportunities.

In late 2008, he began working on what he called his ENABLE project (Executive Network of Advisory Boards for Leadership Excellence). He personally knew a large number of respected, experienced managing partners who were now retired or about to retire. Having spoken to many of them he knew that they were keen to continue to use their management experience, but in a way that was not too demanding of their time. With the wave of inexperienced managing partners coming in, McKenna believed he had the ideal match.

The idea was to create a personal board of advisors for managing partners made up of the smartest, most experienced people in the field. These people would be independent, so you could tell them about the firm issues, and experts in specific specialties, so you could choose your board to meet your unique, individual needs.

First, he set about gathering the advisors he could call upon to make up his Boards of Advisors. McKenna drew up a list of advisors that he believed would have the experience to provide counsel on any issue that a managing partner might need to deal with. He then sent each of these prospective advisors the following letter;

*For the past three years now, I have been facilitating a master class for new law firm managing partners held at the University of Chicago. One of the shared needs expressed by participants is the admission that they don't exactly know where to turn (outside of their partners – which is not what they're looking for) to access good objective advice.*

*In the corporate world, many CEO's have their own personal Advisory Board. In these companies, the Advisory Board does not replace or interfere with the duties of the formal Board of Directors. Rather, Advisory Boards are comprised of highly experienced individuals drawn from a diverse background, who can supplement the CEO's attributes and serve as a sounding board to offer counsel on important business and growth issues; but where the CEO is not obligated to take any action other than whatever he or she deems appropriate.*

*The major hurdle in adopting the Advisory Board approach to professional service firms, has been in identifying and compiling a pool of willing and accomplished resource people. Thus, the reason for my communicating with you at this time.*

*Over the next couple of months I am going to be working diligently to assemble a group of (paid) advisors willing to offer their services to those managing partners (starting with law firms) interested in constructing their own personal Advisory Board.*

McKenna was delighted with the responses. In mid 2009 he wrote to his confirmed advisors;

*As of today, you are amongst a group of just over 60 confirmed confidants. We have the retired leaders of twelve AmLaw 100 firms and five AmLaw 200 firms; 10 of the premier Accounting profession thought leaders (according to Accounting Today) and retired managing partners; a half-dozen academics recognized for their work in studying professional service firms; together with some of the foremost experts in everything from crisis management and competitive intelligence, conflict resolution*



*and multi-generational issues, to innovation and virtual teams; lightly tossed amidst a number of notable executive coaches and leadership development gurus. Between the years of management experience, the number of Ph.D.'s and notable book authors, this distinguished group should definitely merit the attention and interest of any firm leader. Last month, my colleague Brian Burke and I co-facilitated the fourth master class of new managing partners, held at the University of Chicago.*

*In the course of covering the day's content and while discussing where new managing partners might turn for advice, by the sheerest of coincidences, one of the participants, the new Chief Executive Partner from 200-attorney Chapman and Cutler commented, "I've thought about doing what many CEO's do in organizing an outside advisory board, but I'm not sure where to look for the best candidates." Where, indeed! I am now finalizing the personal note and supplementary materials that I will be directing to selective managing partners, starting with those 40+ who have attended our First 100 Days program over the past few years. I will be introducing the ENABLE Program by way of an e-mail and then personally following up with each firm leader.*

Everything was now in place to begin. The plan was for McKenna to follow-up a personal e-mail with a telephone call to each managing partner to explain the benefits of having their own personal Advisory Board. If they were interested, he would come and meet with them to do an audit of the challenges they were facing and the areas in which they wanted the most advice. He would then prepare for them the profiles of those advisors whom he felt possessed the most expertise and experience in those areas. The managing partner would then select between four or five advisors whom he or she would interview. Once they were happy with the selection of their board members, they would begin their board meetings, which would take place at least three times per year to discuss their most pressing issues.

McKenna set a modest fee of \$9500 (plus any disbursements involved) to cover all of these steps, including developing a written 'charter' for the advisory board; consulting with the managing partner to select and provide the advisors with the first meeting's agenda and supplementary materials; and (if the managing partner wished) actually facilitating the first meeting. McKenna tested the viability of these fees with several former managing partners whose opinion he valued and all agreed that there should be no fee sensitivity at this level.

McKenna enlisted the help of Mike Anderson, a retired Edge partner, to help him contact the prospective managing partners. Between them they compiled a list of over 100 law firm leaders whom they personally knew, they thought could be interested in the program. From October 2009 to July 2010, McKenna and Anderson contacted over 100 leaders to explore their interest in setting up their own personal advisory board.

The initiative was a complete bust. While every firm leader that was contacted expressed general interest in the idea, after numerous follow-ups, none were prepared to commit to following through on establishing their advisory board – except one firm who pursued the idea on their own with a small group of local business people as advisors.

McKenna had gathered an experienced pool of advisors who were ready to help, but discovered that for some reason, new managing partners were not willing to take on their counsel. As McKenna sat back and reflected, he knew that somewhere there had been a disconnect, but as yet it was not clear where. He looked out the window of his office and wondered, what had gone wrong and what he should do next.

## **APPENDIX 1: The Rainmaking® Program**

RAINMAKING® doesn't focus on lectures. Instead it isolates critical business development and client relations skills, and breaks them down into a few key steps. With the aid of realistic video demonstrations, RAINMAKING® shows you an example of the key steps being carried out. Then comes practice, followed by feedback. This practical combination promotes usable "in-the-office" application.

The result is high performance "rainmakers" possessing skills that enable them to approach client interactions with the energy and confidence necessary to be effective. Mastering these skills is a prime determinant of successful performance for individual lawyers and their firms. Those who succeed will thrive. Those who don't will stagnate.

RAINMAKING® is comprised of individual "stand-alone" modules designed to help lawyers deal with the most frequently faced and difficult client situations.

### **AN INTRODUCTION**

Because each of the RAINMAKING® skills is teachable, the learning methodology is explained and its basic elements are described.

### **MODULE ONE: ACTIVE LISTENING**

At the very least, an inability to listen can cause confusion and misunderstanding, resulting in the loss of time and fees to the responsible lawyer. See the value in positively impacting client communications through active listening.

### **MODULE TWO: HANDLING TELEPHONE INQUIRIES**

One of the greatest untapped resources for business development comes in the form of countless telephone inquiries from prospective clients. Discover ways to convert those inquiries into active ongoing clients of your firm.

### **MODULE THREE: COURTING PROSPECTIVE CLIENTS**

Many occasions will arise when you will make contact with people who may be prospective clients for your services. Learn how to follow up and take full advantage of those occasions.

### **MODULE FOUR: MEETING THE PROSPECTIVE CLIENT**

The first meeting with a prospective client can be unnerving for even the most experienced practitioner. This session will show you how to handle the interaction effectively while maintaining a consultative atmosphere.

### **MODULE FIVE: MANAGING CLIENT EXPECTATIONS**

Many find out the hard way that clients don't appreciate good efforts that fall short of their expectations. This module teaches the basic steps to creating the ruler by which the client will inevitably measure your performance.

### **OTHER RAINMAKING® MODULES**

**MODULE SIX: REQUESTING RETAINER FEES**

**MODULE SEVEN: CROSS SELLING SERVICES**

**MODULE EIGHT: TRANSFERRING THE CLIENT**

**MODULE NINE: ASKING FOR REFERRALS**

**MODULE TEN: DELEGATING CLIENT WORK**

**MODULE ELEVEN: HANDLING ACCOUNTS EXCEEDING ESTIMATES**

**MODULE TWELVE: HANDLING CLIENT COMPLAINTS**

## **APPENDIX 2: The PracticeCoach® Program**

### **Beyond Talk, Beyond Inspiration - Taking Action.**

PracticeCoach® is not another conventional leadership "training" initiative, but rather a **management system**. PracticeCoach® is comprised of twenty-seven (27) "stand-alone" modules designed to help practice group leaders and their members deal with their most critical performance issues.

#### *I. HELPING OTHERS BE MORE SUCCESSFUL: [Practice Leaders only]*

- 1. The Power Of The Practice Leader**
- 2. What Good Coaches Do**
- 3. Managing As A Valuable Activity**
- 4. Where You Spend Your Time**
- 5. Performance Coaching**
- 6. Helping Shape Meaningful Objectives**
- 7. Motivating Other Professionals**

#### *II. CHARTING YOUR COURSE:*

- 1. Setting A Personal Focus**
- 2. Establishing Shared Ambition**
- 3. Inspiring Teamwork**
- 4. Developing A Practice Group Plan**
- 5. Assessing The Caliber Of Our Practice**

#### *III. DEVELOPING A HEALTHY PRACTICE:*

- 1. Improving Profitability**
- 2. Effective Delegation**
- 3. Measuring Engagement Profitability**
- 4. Scheduling Work Assignments**

**5. Supervising Transactions**

*IV GETTING BETTER BUSINESS:*

**1. The Practice Development Package**

**2. Marketing To Existing Clients**

**3. Systematic Listening**

**4. SuperPleasing Clients**

**5. Nurturing Existing Clients**

**6. Attracting New Clients**

*V. BUILDING TEAM SPIRIT:*

**1. Building Skills & Sharing Knowledge**

**2. Giving Recognition & Celebrating Successes**

**3. Encouraging Innovation & Removing Obstacles**

**4. Differentiating With Perpetual Action**

## **APPENDIX 3: Initial ENABLE Marketing Note to Managing Partners**

Greetings:

Imagine having a series of half-day meetings with your own personal Advisory Board. Imagine that your personal Advisory Board might include the recently retired Chairman of a firm with 7000 professionals operating across 72 countries; the author of three business best-sellers and a five-time contributor to the Harvard Business Review; the senior leadership consultant from the Tom Peters Company; and one of the leading international known gurus in legal technology and knowledge management. Can't you just imagine the kind of intensive discussions and the quality of the counsel you would receive.

Forgive the intrusion. I'm writing to invite you to consider taking a walk with a group of experienced professionals who have already been down many of the challenging paths that you're probably looking to navigate your way through.

Consider for a moment: As the leader of your firm, where do you turn for counsel on issues like . . . knowing how to get some of our more reluctant partners to accept some necessary new change; determining how you might effectively implement some of the various alternative billing models; or figuring out how to help those partners with underperformance, behavioral problems, or retirement challenges.

Perhaps even more profound, if you are like many of your peers, you puzzle over how to integrate your firm's culture and really provide seamless service when spread across multiple offices; you agonize over how to posture your firm for a period of flat economic growth and potentially decreased client demand; and you try to make sense out of how technological advances may significantly disrupt the conventional ways in which lawyers have practiced.

To specifically help you address those and other sensitive issues, I've just launched a new innovative initiative entitled **The ENABLE Program** (Executive Network of Advisory Boards for Leadership Excellence) and intended specifically to be a unique resource for managing partners like yourself.

### **SOME BACKGROUND**

For the past three years now, I have been facilitating a master class for new law firm managing partners held at the University of Chicago. One of the shared needs expressed by participants is the admission that they have never been properly trained to take on the responsibility of managing a multi-million dollar operation and often have only their predecessor to lean on for advice.

And from more experienced firm leaders I hear how difficult it can be, in knowing just where to turn, when you either don't have specific expertise in-house or frankly, may be somewhat reluctant to discuss some sensitive issue with any of your partners. Meanwhile, I find it ironic to be talking with recently retired and highly experienced (at least ten years) managing partners who have played a significant role in building their large, name-brand firms and now that they are retired, wonder where they might make a meaningful

contribution.

But it doesn't have to be this way!

In the corporate world, many CEO's have their own personal Advisory Board. In these companies, the Advisory Board does not replace or interfere with the duties of the formal Board of Directors. Rather, Advisory Boards are comprised of highly experienced individuals drawn from a diverse background, who can supplement the CEO's attributes and serve as a sounding board to offer counsel on important leadership and growth issues; but where the CEO is not obligated to take any action other than whatever he or she deems appropriate.

The major hurdle in adopting the Advisory Board approach to professional service firms has been in identifying and compiling a pool of willing and accomplished resource people.

I believe I've overcome that hurdle.

## WHO'S INVOLVED IN THIS INITIATIVE

I'm pleased to report that I have now gathered together a group of over 60 confirmed confidants. We have the retired leaders of twelve AmLaw 100 firms and five AmLaw 200 firms; 10 of the premier Accounting profession thought leaders (according to Accounting Today) and retired managing partners from global firms; a half-dozen academics recognized for their pioneering work in studying professional service firms; together with some of the foremost experts in everything from crisis management and competitive intelligence, conflict resolution and multi-generational issues, to innovation and virtual teams; lightly tossed amidst a number of notable executive coaches and leadership development gurus. Between the years of management experience, the number of Ph.D.'s and notable book authors, this distinguished group should definitely merit the attention and interest of any firm leader.

Our process is designed to get your personal Advisory Board in place and adding value quickly. The sequential steps we take are straightforward and include:

**1. Discovery Process** - We begin by conducting a confidential interview with you (and any other key partners you select) to gain the background necessary to enable us to determine an optimum skill mix for your advisory board. To be most effective you will need to:

Define Your Objectives.

Identify The Required Expertise.

Determine the Number of Advisors and Frequency of Meetings.

Develop A Compensation Plan.

**2. Board Member Identification** - Using the information gained from our discovery process, we create a written profile of the ideal candidates including desired management experience, special skills, functional roles and professions they have worked in. Utilizing the outlined criteria we will then review our data-base and help search for appropriately credentialed Advisory Board candidates. We will contact and personally interview each qualified prospect to determine their initial interest in wishing to become an active member of your advisory board.

**3. Board Member Selection** - A group of qualified candidates will be presented for you

to interview, either in person or via teleconference or videoconference. Our mutual goal is to select advisors that will complement and strengthen your and your firm's strategic thinking and enhance your continued success.

**4. Board Member Orientation** - It is important to develop a clear understanding of your role and responsibilities to your Advisory Board members (e.g., providing members with meeting agendas and appropriate materials sufficiently in advance of meetings); and of the Advisory Board members to you (e.g., time commitment and advance preparation). We will also determine with you, a set of appropriate 'briefing materials' to provide to each board member for their review prior to the first official meeting of your Advisory Board.

**5. Advisory Board Implementation** - We will assist in the initial stages of formation and administration of your advisory board to assure that the board becomes a productive asset as soon as possible. Specifically, we will develop a 'Board Charter.' We will help you develop an agenda for your first meeting and help organize the meeting, including defining any preparatory materials to be sent in advance. Generally, this first meeting is a bit longer session, as it is important to work together to set some ground rules and ensure that everyone is on the same page regarding your expectations of the Advisory Board.

**6. Annual Performance Audit** - Annually, we will check in with you to determine how things are progressing and whether any additions or changes to the board composition are required due to changing business conditions or your personal goals,

#### ACTION REQUIRED NOW

I would like to talk to you more about my ENABLE Program. I would appreciate hearing back from you and determining whether there might be a convenient time for us to schedule a call to discuss this initiative.

Kindest regards,  
Patrick