# Herding Cats

A handbook for managing partners and practice group leaders

McKENNA RISKIN

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*This book is dedicated*

*to our parents,*

*Madeline & James McKenna*

*and*

*Tedi and Samuel Riskin,*

*whose inspiration continues,*

*and our loving spouses,*

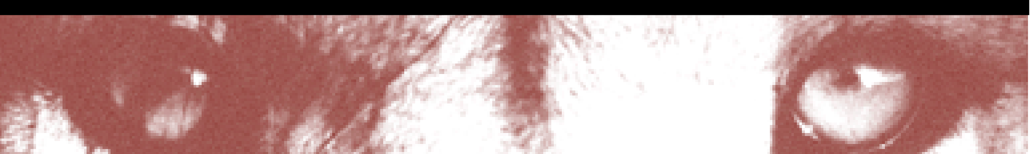
*Monique and Bethany,*

*for their continuing*

*support and patience*

# table of contents





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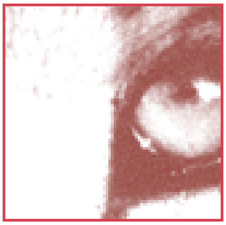
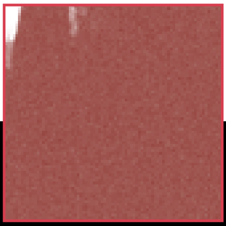




# Your introduction to Cat-Herding

"Your firm can **never** be something the leader is not."

Give a synonym test and the words most closely associated with managing partner might very well be leader, charisma, and visionary. Now ask a respected managing partner, with a few years of experience, which words he or she most closely associates with the title and you are likely to hear terms like coach, servant and friend.

Whether in service to your firm as a managing partner or heading up a practice group, by now you will have heard all of the common clichés about how the job of working with and managing other professionals is akin to being the only fire hydrant on a street of dogs, like lighting your hair and then putting the fire out with a hammer, like nailing Jell-O to the wall, pushing string across a table or (the one we most commonly hear quoted) **"like herding cats."**

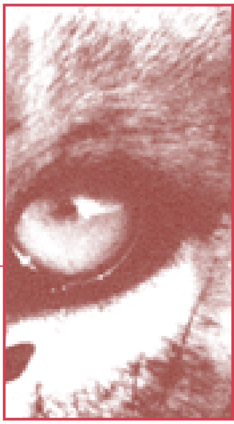
This handbook is intended to be a catalyst to provoke your thinking and provide you with a working reference of what the job really entails. You will find no pompous concepts spelling out the quick-fix leadership-awakening diet. There are no arrogant value judgments proposing one type of firm culture, compensation system, or leadership personality as being more desirable, superior or effective than any other.

What we hope you will find is a rich menu of practical and inspiring examples drawn from our focus group research with managing partners throughout North America, our client assignments internationally and our practice group leadership workshops that demonstrate the "best practices" focus of those who effectively get extraordinary results within their firms.

This handbook offers a set of leadership practices that are based on the real-world experiences of those actively responsible for "Herding Cats!"

# When leaders are at their **Best**

"At the end of the day, if you haven't helped others improve, you've wasted your time!"



The performance of any professional services firm is primarily driven by the performance of the managing partner and those professionals responsible for leading specific practice groups. From our research and work with firm leaders it has become evident that the essential quality of an individual in this position is the ability to inspire others to accomplish more then they otherwise would.

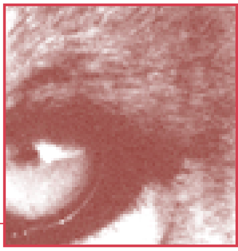
Since the job of managing partner is to help other professionals to be even more successful, firms want those leaders who have a consistent track record for being generous with their time on behalf of others, even if it is not in their own short-term best interests. These individuals find ways to make people feel important and are highly visible moving around the firm meeting with everyone. They are seen as approachable; they seem to spend more time with their professionals than might be reasonably expected.

They are seen as highly competent. They are usually experts in some area of practice. They are seen as credible, trustworthy (as evidenced by their doing what they promise to do), and are viewed as people with advice that is sound when guidance is required.

Since a major role of the leader is to assist others in the firm to win the trust and confidence of their clients, the most effective leaders are those whom others might call upon to help out and strategize in situations involving difficult client interactions.

A leader is that individual who has innovative ideas, who is more concerned with how to make the firm "better" than simply how to make the firm bigger; concerned with how to develop collaborative teams, how to provide a mutually supportive environment for all of the people; and who has a concrete action plan that can deliver on those goals. Leaders make time to get to know their people.The best leaders inspire others to extraordinary efforts by helping them find the excitement, the challenge, the fulfillment in what they do.  The best leaders really care about their firm being recognized as the best. They set high expectations. Managing partners see and describe more potential for their people than individuals might perceive for themselves. They support the champions. They help people advance ideas even when some power partners in the firm might be highly skeptical. They have a sense of fun and humour. The good managing partners seem to take their job very seriously, but not themselves.

Ask yourself this question: "Am I in this position to do something, or am I in this position for something to do?" Now, take out a piece of paper, label it, "What I want to accomplish." Make a list of all of the things that you want to achieve during your term of office. Keep a journal of your thoughts, ideas and improvement efforts.



Get to know each

Individual cat

"It's a

matter of mutual

investment."

There can be no real glue holding a firm together and certainly no leadership, without some degree of intimacy - some human acknowledgement of one another; that we are all people, each one with a unique story, unique difficulties and unique dreams. Leaders must see into the heads and hearts of those they would lead. Those who think leadership is about the leader have it exactly wrong. Ignore the people and the people will ignore you.

It all starts with getting to know your people: their strengths, their shortcomings, their aspirations and their fears. There is no substitute for face-to-face human interaction. The very best way to get to know what other people in your firm want is to sit down and communicate with them about it - on their own turf. Listen to them. Find the common ground.

Take a personal interest. How many other partners know what day your birthday is - or even care? Get out and visit with your professionals in their offices. Explore with each of them: • What do you want to be famous for? • What makes you soar? • About what do you have a burning passion? • What work do you find absorbing, involving, enthralling? • What is your personal agenda? • What do you want to prove to your peers? • What do you most want from this firm?

Our professionals need to either find the work they love or learn to love the work they have. They need to get passionate about their profession or get out. This is where many "wanna-be professionals" succumb to the "victimitis virus." "How can I spend time developing a practice that will make me famous tomorrow, when I'm only rewarded for my billable production today?" they sniffle. Some people spend more time planning their vacations then they do their professional careers.

The good news is that each of us thrives upon achieving some form of distinction, be it specialized expertise, excellence in client service or an innovative approach to client problem solving. Each of us has a deep craving to make a difference.

The question that we must help each of our professionals face and answer effectively are: "How do you want to be positioned in the market and in the minds of your clients?" and "What is clearly unusual, unique, distinctive and of great value to clients about the services you offer?"

If their answers, in about 25 words or less, are not convincing to prospective clients, they need your help and guidance in working through the future of their practice and career development. You need to help them understand that the only true professional career security is in being more valuable to clients tomorrow than yesterday.

A painless way to do this might be to ask: "Tell me about your favorite client matter and without any modesty tell me why that assignment was special for you." Have them write out their major client accomplishments of the past twelve months. Have them consider exactly what they will be doing for clients over the next few months. Have them consider how fundamentally different that might be from what they did 12 months ago. Could all of this be the beginning of some area of distinction?

**Become** an enthusiastic

# Change

agent

"No one's blood was ever stirred by a **leader** who stood in front of the troops and said, "Let's dare to be **conservative!**"

It is said that we are now living in a world of accelerating change. Your job as the leader is not to react to change, but to create change. So why not enter the fray with all guns firing, all hands on deck, and everyone focused on the targets you have chosen. No one enters the Olympics shouting "Go for the bronze!" Pursuing the gold and ending up with the bronze is a noble effort, but pursuing the bronze and ending up in 13th place makes little sense.

What was unthinkable yesterday is routine today. If your firm's culture doesn't adapt - rapidly - everybody loses. Trying not to disturb people, seeking to appease everybody by taking it slow and easy, can be the least effective move of all. People are not naturally resistant to change. It is not a function of DNA, heredity or their university education. It is, however, a function of the firm's culture and internal systems. You cannot please every partner, even under routine circumstances.

Attempts at incremental change -"tweaking" the firm - ordinarily die for lack of energy. If you try to go slowly, bureaucracy and resistance to change will cancel out your efforts. So get radical. Take action that turns heads. Let your opening moves leave no doubt that the old ways of doing things are incompatible with what is to come. Leaders cannot ignite the flame of passion in others if they themselves do not express enthusiasm.

In fact, we expect our leaders to be enthusiastic, energetic and positive about the future. Did you ever notice that while church dogma is more or less a given for any particular religion, the energy and enthusiasm of the parish priest, rabbi or imam can make an enormous difference to attendance at the place of worship?

Take your instructions from tomorrow - that is where you will find the answers you need. The window to the future gives better guidance than the mirror of the past. A quick scan of the future tells us that your firm's very survival depends upon speed. Competitive advantage will come from being faster than your opponent. The race is to the swiftest. Do not waste precious time and resources looking backward. This is a time for action, not introspection.

Leadership is action, not a position. Proactive leaders will often pull the fire alarm when they spot critical changing conditions and fan trends into a looming crisis. Everyone is urged into immediate action. What external trends are you observing that should be causing you to pull the fire alarm and issue a call for action within your firm?

Even if you have served as managing partner for years, treat today as if it were your first day. Ask yourself, "If I were just starting in this position, what would I do?" Chances are you would do some things that you have just not gotten around to. Begin doing those things now.

Pick one major project per quarter; implement one smaller improvement every two weeks. Focus on the do-able. Keep the urgency and enthusiasm for constructive change and improvement high.

# Provide a **Living** example

"The true consistency of leadership is exhibited in the **trivial** actions, as much as the bet-the-farm decisions."

Effective managing partners take advantage of the power of or setting a positive example. They make themselves highly visible on a regular basis in myriad different ways and use that exposure to reinforce what they believe in, the direction they believe the firm should be headed and how they intend to get there.

As a managing partner, you have at your disposal a wide variety of “mundane tools” embedded in your daily message sending and receiving activities that can be used to energize and influence the firm’s articulated values, direction and desired behavior.

The time you spend wandering around the firm meeting with people is your most powerful tool. Nothing speaks louder about what is of bedrock importance than where and how you choose to spend your time. Where a managing partner spends time is not a matter of chance. Choices are made daily about what to do and with whom - from the choice of business development issues for the monthly breakfast meeting to the selection of performance measures which are tracked on a regular basis, your selections over time send clear signals to the firm about what you believe to be truly important.

Start spending 30 to 40 percent of your time on your most important strategic priority. Book your calendar for the next quarter with activities that demonstrate your interest in and concern for that priority. Consider turning your partners’ eyes to new horizons with a formal system of “strategic forums” designed to formally force regular discussions of key issues facing the firm.

One of the enduring questions - a subject of endless analysis - is how a large firm can best monitor operations spread over many geographical locations. One managing partner we know reduces all of the elaborate mechanisms to plain, old-fashioned face-to-face contact; he visits each of thirteen offices as many as eight times a year, meeting with different practice groups and support staff. What is your plan for providing hands-on leadership?

Find those professionals who are doing something that you wish more of your people were doing and hold them out as models of moving in the right direction. Let everyone get a clear idea of what you are looking for. Effective leadership concentrates on reinforcing and rewarding actions consistent with stated direction. “What receives recognition is clearly what is valued.” People are keenly attuned to what is accorded recognition...even the most trivial manifestations.

Every firm holds numerous meetings and every meeting has an agenda, whether written or unwritten. The cumulative content of these agendas clearly signals executive committee priorities and concerns. The conscious management of your own agenda, and your input into practice group meeting agendas, is another powerful signaling device. Also, the things that get your swift and detailed follow-up will always be perceived by people to be of real value.

The specific words used and the pattern of questions asked by the managing partner have an enormous effect on the firm’s focus. You need to manage those patterns: people will read meaning into them. Why not target for what you want?

Support practice

group **Collaboration**

"No single partner has a monopoly on wisdom."

Leaders energize professionals to take action for the benefit of their practice groups rather than their own self-interests. They show how everyone's individual practice objectives can best be advanced by working together. They structure cooperative goals and show how collaboration will allow the practice group to make the most of its resources. They indicate that in addition to individual rewards, there will be consideration given for the extent to which the group succeeds.

Effective practice groups are comprised of a small number of professionals with complementary substantive expertise who are equally committed to a common purpose and actively working to assist one another's professional growth and success.

Accept the reality that the practice group approach may take longer but usually adds more value and produces better results in the long-term. Make practice group collaboration a stated performance expectation. Involve others in compiling a list of characteristics and benefits to effective practice group performance; then hold professionals accountable for cooperative behaviors and contributing to one another's success.

Provide training for practice group leadership and for individual professionals to help them work effectively together in teams. In designing a practice group environment, do not expect professionals to crave constant contact with one another. Do not assume people can or will work as a group merely because they have organized themselves as such.

Understand that groups do not cooperate: people do! Create as many opportunities as possible for individuals to get to know one another and work together. Provide opportunities for members of different practice groups to socialize together so that social bonds can drive cooperative business goals.

Find opportunities to visibly demonstrate that group collaboration works; opportunities that evidence the benefits that can be realized through cooperative efforts among professionals from different practice groups. Identify a new client engagement, share and employ an idea or methodology that was successful, spotlight a referral that was effectively made or integrate a new initiative that was developed.

Effective practice groups meet frequently. However, if meetings are where minutes are kept but hours are lost, your practice group leaders may have a skill problem. Meetings should reenergize and refocus. Many do not. With the proliferation of practical resource materials, seminars and training now available, there is no excuse for poorly run meetings.

## Avoid the Quick fixes

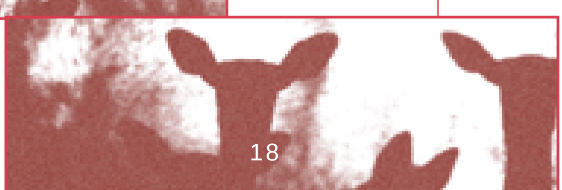
"The pure and simple

**answers**

are rarely pure and

**never**

simple."



The quest for the quick fix and the easy answers are often the greatest temptation for many managing partners.

We are passing through an era of total quality management and empowerment to one of reinvention, reengineering and transformation - and we hate it. We hate change because no matter which response we make, it wins. If we do not embrace change, it overtakes us and it hurts like hell. If we do embrace it, it still knocks us for a loop. If we try to anticipate it and be ready when it appears, well, it doesn't make much difference, we still wind up on our keesters. Change is pain, even when self-administered.

The quest for the quick fix is predicated on the desire to avoid uncertainty, risk and pain. These fixes are all admirable and may conceptually be necessary for success, but they require a tremendous amount of your personal commitment, perseverance and courage to execute properly. To bear fruit these concepts cannot simply be supported intellectually, pursued when people "have the time" (as if anyone ever has the time) or performed within the context of how things are currently done.

We have sometimes joked with managing partners that what they are really asking is: "I am willing to change as long as it can be done risk-free, quickly, inexpensively, without offending any of my partners and certainly without any sacrifice of my calendar time or my personal behavior." Unfortunately, that sort of thinking gives birth to program-of-the-month-type managing. While these pseudo-efforts may spike performance a bit in the short-term, they spike firm-wide distrust and cynicism in the mid- or long-term. The only result that is not temporary is the loss of leadership, credibility and integrity.

Some managing partners have difficulty accepting this message and enmesh themselves in a perpetual search for the technique that will act as the magic bullet against the vagaries of change and the difficulties inherent in making painful transitions. Breakthroughs begin when firm leaders accept the fact that good intentions are not enough and that what is really required is a bone-deep commitment to taking long-term, consistent action toward small, continuous improvements in providing more value to clients.

Achieve hard **Results** in a hurry

"The journey of a thousand miles begins with the **first** step."

Leaders know that the most effective change strategies are processes of accumulating little incremental victories - even if the ultimate goal is a complete overhaul of the system.

Set small incremental objectives that are easily achievable: sustain enthusiasm, divide the tasks, reduce them to their key essentials, make things manageable with brief time investments and move forward with incremental implementation efforts. Small wins breed success and compel us down the path. Field tests, pilot projects, trial balloons, trying something new in a contained environment and selecting one site or program with which to experiment are all ways to facilitate the process of getting started.

Start with your business plan or practice development agenda. Involve in your planning initiative all your people who will be counted upon to help in the implementation efforts. Individual professionals only support, believe in and show commitment for a firm direction which they themselves have had some active part in formulating. Planning together and having people make their own decisions increases the likelihood of commitment to implementation.

The greater number of goals and objectives the firm or practice groups have, the worse the performance will be. The long and the short of it is in focusing on the "doable." Anything beyond six months takes you into the realm of pipe dreaming. Too many things can go wrong. If you have an action plan pushing beyond the six-month limit, break it down into smaller tasks that fit into shorter time frames. This way your firm is continuously knocking down fresh goals and objectives, experiencing success, staying on track, moving quickly and raising overall motivation to continue.

Each action, therefore, should be the responsibility of a specific professional in the group. Implement things in small, planned chunks. Every month have the group give attention and seriousness to reviewing the cumulative action plan, assess what has been accomplished to date and have them ask: "What are we going to do next?" Be certain to make progress visible.

Spend time outside of your firm consciously looking for new things to try. Set up small, relatively inexpensive and minimal-risk experiments. The best hope of success lies in having numerous projects percolating at once. This ups the odds of one of them boiling over. As Linus Pauling, the Nobel winning chemist, once said, "The way to have lots of good ideas is to have lots of ideas and throw away the bad ones." Early successes breed optimism, the enthusiasm to do more and the commitment to try again. It is a system to institutionalize "continuous improvement."

Finally, consider preparing an annual improvement report. This is a collection of all the positive changes and incremental improvements of the past year throughout the firm. It could be a collection of summaries, stories, improvement charts, lessons learned, accomplishments and the like. When your professionals read through this report expect it to be a surprise, but also a source of enormous energy as people get inspired by the cumulative amount of constructive change and improvement that has been made. Do not miss this opportunity.

Make sure **Everyone** knows the business

"It's easy when you don't know **how**, but very difficult when you do."

Much has been written over the years and many firms have expended considerable effort to improve their cross-selling efforts with clients. There remains a continual struggle among all of these efforts because as our firms have grown, as our professionals have become more specialized and as the range of services to clients has expanded, our professionals appear to know less and less about each others' practices - especially their subtle intricacies.

The successful leader knows that to help make cross-selling work effectively, the task more than promoting the important aspects of the firm's services externally to existing clients. Often, the real challenge is to convince professionals of the merits of promoting the firm's services internally in order to help others become more conversant and knowledgeable about the depth and breadth of the firm's services.

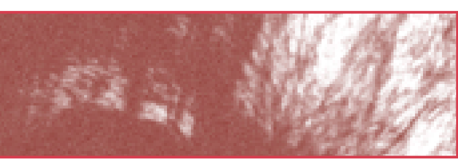
Invite a different practice group each month to organize and conduct a luncheon briefing on a significant client project that professionals are working on. Have them describe what is new and emerging in their area of expertise and when the other groups should be sensitive to seeking out their counsel on behalf of clients. Encourage an atmosphere in which everyone can "show off" results, explain what they are working on and swap ideas.

Encourage every practice group leader to invite people from the firm's other practice groups to offer constructive suggestions for improvements. Many of the opportunities or problems one practice group may be facing could be old hat to another practice group. Conversely a new solution might be developed. Diversity is a helpful catalyst for creativity.

Encourage professionals to set personal goals for learning something new every week about their areas of practice and about the firm's cumulative service offering. Encourage practice group leaders to direct their groups toward becoming "continuous learning machines."

# Crank up the communication effort

"We routinely **underestimate** the amount of communication necessary to make our efforts successful."



Communication gaps cause problems. Bad news, rumors, and worst-case thinking quickly creep in to fill the void. The less one knows, the more one suspects. People in your firm will make up their own explanations for events and actions that they do not understand. Keep the dialogue going. Nonstop, two-way communication is needed to offset ambiguity, counteract confusion, overcome gossip, shift attitudes and keep your people on course.

Think of communication and trust as being yoked together. They rise and fall together. If you want to interact effectively with others - to influence them - you need first to understand them. Everyone in your firm is tuned in to radio station WIIFM - "What's in it for me?!" Communicate in terms of others' interests, not yours. Use e-mail, voice mail, teleconferences, videos, memos, notes, breakfast meetings, brainstorming sessions and face-to-face conversations to spread your message and keep people informed.

Keep doing it until people tell you that you are overdoing it. Just when you are sick of repeating the same core messages over and over again, people start to hear you. First, they do not hear. Then, they do not understand. Then, they do not believe. If you stop repeating yourself now, they will conclude that you were not serious after all. Michael Hammer, author of the bestseller *Reengineering the Corporation,* reminds us of the rule of seven times seven: "The same thing must be communicated seven times in seven different ways before anybody will believe it."

Get people together. Get practice groups to meet on a regular basis - given the meetings are well run. This is especially important for those practice groups whose members are spread out geographically. Effective leaders find that most misunderstanding, mistrust, and misdirection can be turned around by getting the key players together.

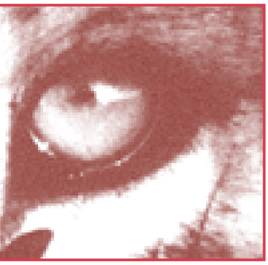
Consider using an internal focus group - a cross section of professionals and support staff - to test new directions before making any specific announcements to everyone. This will give you a deeper insight into how to address any issues that may be expected to arise from feedback received in focus group discussions.

Consider the possibility of doing a retreat for the support staff to allow them to express concerns and also identify solutions to those issues they perceive as important.

Establish an internal "best practices and good tries" communication system, clearinghouse or network. Get feedback from your clients on the characteristics and performance of your communication systems and practices.

Good communication does not necessarily guarantee success, but poor communication does guarantee failure.

# Sweat the small stuff



"Pay attention to something and it is perceived as important."

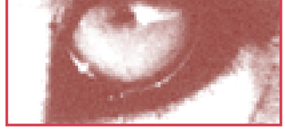
So you want your professionals to focus on quality, service or innovation issues that you believe to be important. Create an environment where they continually trip over them.

You want to increase people's attention to client service. Distribute feedback surveys to clients upon the completion of every major engagement and post client responses in the partners' lounge. Design a chart listing all of the firm's major clients with space for who and when that client was last visited at their place of business and see what happens.

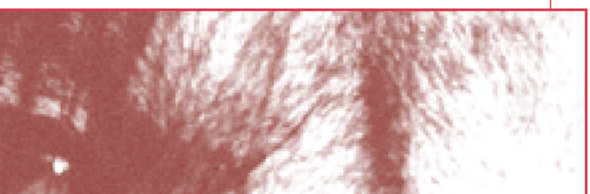
You want to have your practice group members become more attentive to the dynamics of what is transpiring in the various industries in which they are active. Start by initiating firm subscriptions to some of the industry-related publications and newsletters and ensure that they are actively circulated to professionals throughout your firm. Take a few moments each month for a quick scan of these publications yourself and highlight articles that you think are worthy of reviewing.

You want to enhance innovation within your firm. Initiate an internal committee of interested professionals to monitor all new developments and trends going on throughout the profession. Have the administrative staff monitor the industry and news media and provide a summary of clippings that highlight the business activities of the firm's clients and prospects, emerging issues or new innovations.

Attention is all there is. Use e-mail messages, charts, suggestion boxes, surveys, focus group discussions, internal invitations for guest-client presentations, whatever. Put pertinent materials in places where your people will be exposed to it. Perhaps put it on their computer screens - daily. The idea is to make it impossible for folks to miss reoccurring, reinforcing messages.



# Focus on innovating-not fixing



"Too much **respect** for problems kills our faith in **possibilities.**"

Most of us are veteran problem-solvers. We are trained to resolve the issue, put out the fire, correct the underperformance and generally "fix" the problem. There is a gravitational field which unconsciously moves us toward fixing things instead of improving, restoring instead of increasing, and reacting instead of proacting.

In your firm, what is the relative percentage of time you spend fixing problems versus being innovative? If we assign 100 percent to the total time invested in both problem-solving and innovation, what is the breakdown between each? Most managing partners tell us that in their firm it usually breaks down to about 90 percent of the time spent on problem solving and 10 percent on innovation. That translates into the firm leaders spending 90 percent of their time and energy looking backward and fixing things, while only 10 percent is spent looking forward. Firms operating in this mode will never lead in their marketplace. What are you doing to help people feel safe letting go of today's certainties and feel comfortable reaching out to create the momentum which will carry them toward tomorrow?

Innovation begins as an attitude and has to be a daily endeavor. Fixing things simply restores the prior performance or condition - which is comfortable but limits value. However, if your focus is on improving the condition - on being innovative - then your intent is not on restoring the status quo but on developing a level of performance that exceeds the previous standards.

Most executive committee and practice group meetings are status reports on the present. If you are serious about promoting innovation, make sure that each meeting devotes 25 percent of the time to listening to ideas on improving systems or developing new services. Be especially vigilant for unexpected and unplanned successes. Dig deeper to understand the unanticipated results. Often, you will find "happy accidents," chance changes or highly effective championing behavior. These are key sources of innovation.

Actively seek out people - whether partners or staff - who are championing some small innovation. Even if you do not personally agree with a specific innovation, ensure that everyone knows that you support the creative thinking that is going on. How many experiments and pilots are currently underway in your firm?

Create an "Innovators' Hall of Fame."

Consider setting targets for innovation. Some companies have long measured performance by the percentage of revenues that come from new service offerings that did not exist five years ago.

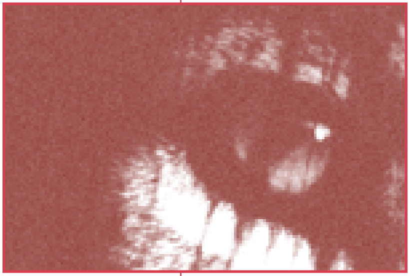
# Build your skills inventory

"Five years from today, fully one-third to one-half or greater of your firm's revenues

will come from **providing** services

that you do not now

**provide.**"



Today's certainties are becoming tomorrow's absurdities. Until relatively recently a professional could have retired having practiced in much the same area, having attained competency in that area and doing pretty much the same thing from the date of entry into the profession. Today, continuous learning and change are conditions precedent for a healthy professional career.

Unfortunately, the systematic development of skills, if left unattended, will not happen by itself. Equally unfortunately, knowledge and skills, over time, come to depreciate in value as competitors eventually acquire and offer similar expertise. With each passing year the fees that clients are willing to pay for that expertise diminishes. Even loyal existing clients will not value what you do for them the second and third time around as highly as they did the first time. Successful managing partners know that a strategy for increasing their firm's inventory of "know-how" assets is critical if everyone's career, their practice groups and their firm are to flourish.

Begin to develop a centralized firm "know-how" data base. Know-how resides primarily in the professional's mind and among rough client file notes. It may include: standard forms; checklists; unwritten procedures; research notes; ways to structure deals; methods of approaching certain projects; work product - briefs, memos, documents; practice area manuals; training materials and written standards.

Consider utilizing video to systematically capture and preserve "know-how." Attempt spontaneous interviews with professionals - especially some of the senior partners within your firm - to instruct and record for others "what they know" about some aspect of a highly specialized area of practice or about dealing with a complicated client intervention.

The essence of a practice group is, above all else, about knowledge - how to get it, how to improve it, and how to pass it on. The distinction between working and learning has never been more blurred. If we are not benefiting from our participation within practice groups, it is probably because we are not sharing what we have learned with one another. Encourage professional development as an integral part of each practice group meeting. At each meeting make it a regular agenda item to ask of each professional: "What have you learned in working with your clients this month?" Ask a different partner each month to give a detailed report on their most interesting client assignment. For the sophisticated, it includes asking the responsible partner to report at the end of each significant mandate anything that they may have done differently.

Initiate a "cross-training" program for reciprocal benefit. Consider approaching an academic institution; government department; financial services, consulting or other professional services firm known to have a level of expertise relevant to serving the interests of the same client base. Collaborate on conducting substantive training for each other's professionals to enhance and broaden the skills base of both groups. Perhaps the only sustainable, competitive advantage you can have is the ability to continuously learn and build skills faster than competitors.

Encourage continuous
abandonment

"Abandon the
bottom 10% of your
business base
at least
every other year."

That sounds harsh but you are actually doing a favor for your clients, enhancing the satisfaction of your professionals and bolstering your firm's bank account. Most firms have clients hanging around their necks who are not being served to any acceptable level of quality, sometimes for understandable reasons.

The managing partner of every firm faces the same unsettling imperative: to build change into their firm's very structure. On the one hand this means being prepared to abandon certain services that the firm has traditionally offered; on the other hand, it means constantly looking to create new services in which to develop expertise. Unless this process of abandonment and creation goes on incessantly, the firm may soon find itself becoming obsolescent - losing performance and with it the ability to attract and retain the best professionals.

In some misguided belief that "all business is good business," many professionals continue to serve and even court clients which were appropriate at a different time in the firm's evolution - but not today. At one time these activities may have made sense because they made cents. However, as your firm grows, these practice areas or clients provide only marginal profit and consume disproportionate amounts of time, energy and effort.

Conversely, these long-term clients or practice areas are poorly served. They take a lower priority to more profitable, higher profile work and are expendable in terms of deadlines and commitments. While these attachments may be highly emotional, the intelligent solution must be to formally review their status at least every two years. Both the client and the firm will be better served by treating these clients realistically.

The key indicator for business which should be abandoned is any fee which is more than 15 percent below the average for the firm or practice group's desired realization. Through this disciplined culling of the client base, you free up the time and resources of partners to pursue and service clients at the top end of your fee structure. You cannot reach out to higher levels without letting go of the lower levels. Such business could be referred to other professionals who are in a better position to effectively handle it. The firms to which they are referred might well reciprocate with business more appropriate to you.

In a more general context, your firm should be putting every practice group, staff activity and technology on trial every three years to determine: "Would we start this practice group, engage in this activity or invest in this technology - today?" If the answer is "No" you must ask, "What do we have to do to stop wasting resources?"

Avoid tolerating

# Mediocrity

Constantly

**fight**

"hardening of the oughteries."

Mediocrity can insidiously work its way through every nook and cranny of your firm. The symptoms are numerous: from aimless meetings that begin late to an acceptance of missed deadlines; from commitments that have little follow-up to surreptitious dialogue in the form of whispers and rumors; from reports long on flash but short on substance to failures to confront individual underperformance. In a culture of mediocrity, complaining, blaming and offering excuses, "what we ought to do…" replaces accountability. Lethargy and complacency replace action. Reactivity and defensiveness replace initiative and risk.

Another symptom of mediocrity is in individuals who hang on to wasteful, useless working routines. People stoically tolerate the daily grind of destructive marriages rather than risking any significant alteration of the status quo. In a similar fashion, immersion in busy work allows people to escape the hard questions, such as, "What am I doing that adds value to the firm?" or, "Would my clients, if they saw me, happily pay for me to do what I am doing today?"

There is no shortage of mediocrity. The truly successful firm displays some form of eminence, a measure of distinction, merit or virtue that transcends the ordinary. Striving to be the best demands a pledge to be better, to do better and to accomplish more. As an effective managing partner you must continually communicate the message that we are the best and are an elite corps. Create infectious optimism and radiate confidence.

Pay attention when someone has a performance problem. You owe it to those who are striving to be their best. Unaddressed deficiencies can have a negative effect upon every member of your firm. By dealing with performance issues as early as possible, you can prevent them from growing more serious and more distasteful for both you and other partners to face.

Provide hands-on, one-to-one coaching. Investigate each deficiency to uncover its root cause. If the issue stems from a lack of skills, arrange for skill-building remedial action with either formal training or senior mentoring. If there is an obstacle to performance, explore what can be done to eliminate it. If it is a personal problem of some sensitive nature, show support and follow through with further meetings to discuss the person's progress. If you believe the professional can perform properly but just is not doing so, review the firm's expectations with them and hold them accountable for improving their performance.

Remove the obstacles

"To keep our ship racing through the water at maximum efficiency, **we** have to keep scraping the barnacles off its bottom."

Notre Dame football coach, Lou Holtz, once said, “It is not my job to motivate players. They bring extraordinary motivation to our program. It is my job not to demotivate them.”

Terry Neill, managing partner of Andersen Consulting’s change practice claims that “leadership is not the things you do to or for your people, it’s often the impediments you take away, leaving space for folks to empower themselves.”

What exactly have you done today to remove obstacles to success from the path of the would-be heroes, the dedicated client-serving professionals in your firm?

Put it on the agenda for your next partnership meeting and your next support staff meeting to ask them what gets in the way of doing the very best job possible. Ask each member of your firm to identify the three most significant obstacles to their performance. Create a master list and develop strategies to eliminate them. Promise to look into everything and get back to them with answers in two weeks. Commit yourself to removing three frequently mentioned roadblocks that stand in the way of people getting extraordinary things done.

If you do not have any control or answers to the obstacles that people are facing, ask the people closest to the action for their ideas on what could be done. Point out the impact and cost of the problem and discuss possible solutions. Even if you cannot eliminate an obstacle by involving those closest to the situation, you may be able to collectively minimize its effect by working with people to explore how to get around the issue.

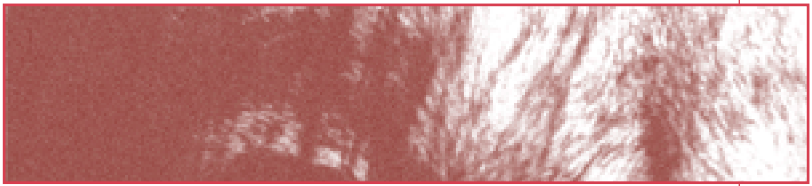
Ask your partners what you may or may not be doing that creates obstacles for them. If they tell you, thank them for their candor, try not to get defensive, and do something to demonstrate your sincerity in eliminating the obstacles that you might be creating.

Right now, make a list of all of the practices in your firm that fit the description: “that’s the way we have always done it around here.” For each one, ask yourself: “How useful is this for becoming the best we can become?” “How useful is this for stimulating creativity and innovation?”

At the next firm or practice group retreat do a review. Build part of your agenda around exploring what we do well, what we do poorly, what we can learn from this, and how we can improve in the future.

Be generous with recognition

"If you can't find something to recognize daily, it means **you** don't know how to look."



Managing partners invariably snare themselves in the trap of looking only for failures to be fixed rather than seeing successes needing to be multiplied. Focusing predominantly on problems and failures encourages people to become overly cautious. It does almost nothing to encourage success, especially in relation to the vital task of regularly innovating ways to do something better.

The most effective managing partners go to great lengths to regularly, obsessively and enthusiastically point out individual professional's successes and positively reinforce those accomplishments. They know that what gets positive attention gets repeated. They make extraordinary efforts to stimulate more numerous future successes by promoting current successes. They accord particular recognition, often with great fanfare, to individual and practice group demonstrations of commitment.

Let everyone "hold the trophy." Be sure each contributing member shares in the recognition for achievements. Develop your list of at least 20 ways to recognize others for their performance and contributions - now. This is not phony flattery. That pat on the back because they-told-me-at-that-management-course-to-do-some-positive reinforcement-stuff is pointedly not the point. Be sincere in your efforts. Praise should be reserved for instances that deserve it.

Focus on the middle 80 percent rather than just the top 10 percent. Don't overlook your top performers, but realize that motivating those top performers to improve will have less overall impact than inspiring the others. And, the prima donna who insists on mopping up all the applause may be a very valuable member but in his or her behavior lies the seed of team destruction.

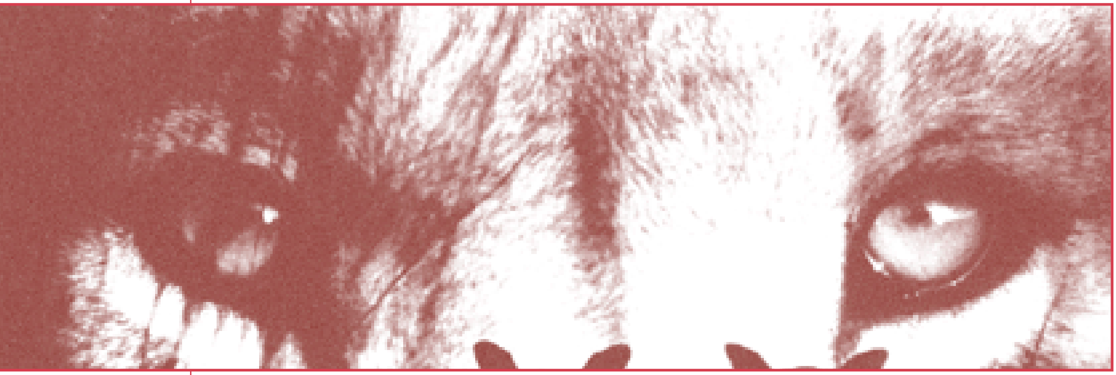
Look especially for small, desired, do-able actions to recognize. The focus should be on reinforcing a professional's act of courtesy to a client or a support staff member going the extra mile on some project. Recognize those individually minor acts which, if repeated by everyone, would add up to superb firm results.

Be a "star-catcher." Regularly, catch people doing things right and recognize them for it. Make recognition self-perpetuating by recognizing those who recognize others. Remember: what gets recognized gets reinforced, and what gets reinforced gets repeated.

Above all, make sure to recognize good tries - not just successes. Well-intentioned efforts that do not work out are just as important as the winners. A criticism, no matter how constructive, seems to have tenfold the effect of a compliment. Keep your ratio of compliments to complaints above 10:1 individually and collectively.

# Track and celebrate accomplishments

"Cheerleading is a large part of the managing partner's function."



Our energy and enthusiasm for continual growth and improvement is strongly influenced by whether we feel like winners, taste success, and are having fun along the way. It is all too easy to let what is not yet finished overshadow what we have accomplished.

Determine what you want to celebrate as the starting point for your cheerleading. The hoopla and celebration are not only for the sake of fun, but for calling attention to and reinforcing your firm's values and accomplishments. If it is important within your firm to have professionals involved in community and civic organizations, then celebrate when one of your people gets appointed to some position of significance. If one of the goals is to generate new clients, then celebrate when someone or a practice group achieves some major progress with client origination. If your firm values loyalty, then celebrate with years of service gatherings. The point here is that everything about a celebration must be matched to its purpose.

Public ceremonies and rituals are the ingredients that crystallize personal commitment. There is a family feeling about celebrations providing concrete evidence that people in the firm care about each other. Generally lighthearted, celebrations tend to reduce conflicts, bond people together and minimize differences.

Celebrating practice group accomplishments recognizes that extraordinary performance is often the result of many professionals' efforts and reinforces bonding feelings of "we are accomplishing significant progress together."

As managing partner, you can play a special role in the art of celebration as you are visible to others in the firm and serve as a role model. Some of the most significant and memorable celebrations are those that occur spontaneously. Look for those opportunities in your firm where you can initiate the "let-me-take-you-out-for-lunch" or "drinks-in-30-minutes-in-the-boardroom" variety of unplanned celebrations.

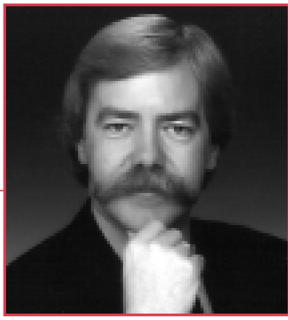
Select a few celebrations that you want people to put on their calendars. Commemorate the founding partners' anniversary, honor the partners who created this year's important innovations, or try celebrating with champagne specific milestones achieved.

And even when times get tough, do not stop celebrating. Knowing that you are not alone in your efforts and that you can count on others if necessary provides the courage to continue in times of turmoil and stress.

As with individual recognition, all kinds of rewards exist for celebrating. Use your imagination. You may be comfortable giving out plaques, flowers and the like.
Do it your way but do celebrate.

# THE EDGE GROUP

Patrick J. McKenna



Gerald A. Riskin

"are Canada's law firm management and marketing **gurus**, with a client base stretching from Britain to the United States."

**The Financial Post**

Since 1983 The Edge Group has worked exclusively serving professional services firms and has developed an international presence having now worked with firms throughout Canada, the U. S., Europe, the Far East and Australia. Clients include those ranging in size from small boutiques to firms of over 1000 professionals and the firm is honored to have served at least one of the top ten firms in over a dozen different countries.

The Edge Group is dedicated to assisting professional services firms in achieving, rekindling, or maintaining their competitive vitality. To that end, the firm's partners are called upon as regular participants to present and chair educational conferences sponsored by the UK Law Society, the ABA Law Practice Management Section, the Certified General Accountants Association, the Canadian Tax Foundation, the International Union of Lawyers, the Association for Accounting Marketing, the Institute for International Research, The Conference Board, The Financial Times of London and Centaur Conferences in Europe in places which over the last few years have included: Amsterdam, London, Birmingham, Brussels, Vienna, Marrakech, Istanbul, Dallas, Washington, New York, Chicago, San Francisco and Toronto.

The firm's partners are also contributing authors to a number of texts, most notably: Marketing For Survival In The 1990's; The Lawyer's Handbook, third edition; Winning Strategies for Client Development and Retention; The ABA Guide To Legal Marketing; Managing Your Law Firm and have provided acknowledged contributions to Competing For Clients by Bruce W. Marcus (Probus Publishing) and True Professionalism by David H. Maister (Free Press).

The firm holds the distinction of being identified in an independent survey conducted and published by Aspen Law & Business as "the most popular marketing consultants amongst the largest law firms throughout the United States." In addition, The Edge Group remains the leading provider of management and training programs. Partners of the firm have provided practical management and leadership training to more managing partners and worked hands-on in enhancing the performance of more practice teams than any other consultancy - anywhere.

To date, The Edge Group has worked with firms internationally in assisting their efforts to initiate, manage, and develop industry practices in areas such as: agribusiness, life sciences, high technology, health care, waste management, franchising, gaming law, women entrepreneurs, reputational management, government lobbying, and law enforcement litigation prevention.

THE EDGE GROUP

*"Creating a Sustainable Advantage"*

## MORE PRACTICAL COUNSEL FROM THE EDGE GROUP

HERDING CATS

A handbook for managing partners and practice leaders

18 Specific guidelines on how to manage your professional services firm or practice group for extraordinary performance.

*by Patrick J. McKenna and Gerald A. Riskin*

## PROFESSIONAL LEADERS PRAISE FOR BEYOND KNOWING

• "*Beyond Knowing* is both profound and practical. There exists no better guide to influencing and leading professionals. This is must reading."

*David H. Maister, author, Managing The Professional Service Firm and True Professionalism*

• "When I first received *Beyond Knowing*, I put it aside for vacation reading. When I picked it up again, I read it from cover to cover and said 'WOW - - what great ideas and thoughts.' I immediately ordered a copy for each of our department chairs and practice group leaders. For me,the most powerful idea in the publication is 'Focusing on innovating - - not fixing.' This single idea has changed the way we manage our firm."

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*David Cruickshank, Director of Professional Development, Gowling Strathy & Henderson*

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*Joseph V. Walker, President & Chief Executive Officer, Plunkett & Cooney*

• "*Beyond Knowing* succinctly presents basic management and leadership principles that are all too often forgotten. It is an easy and quick read and probably should be read a few times a year by anyone who leads a law firm or a practice group within a law firm."

*Lawrence Gerber, Managing Partner, McDermott Will & Emery*

• "I certainly enjoyed reading your original publication *Beyond Knowing* and I must confess I have heard it more accurately described recently as 'more akin to herding Tigers'. I feel that your publication brings together in a clear and concise manner some of the fundamental issues that face those involved in managing professional service firms."

*John Churchill, Managing Partner, Dunhill Madden Butler (Australia)*

• "Forget the latest business blockbuster and the management theory-of-the-month club, *Beyond Knowing* has more practical, usable information on leading a professional service firm than anything I've come across in years. It's a half-hour reading investment that pays off with a recommitment toinnovation, communication, and true leadership."

*William L. Matthews, Managing Partner, Plante & Moran, LLP*

## MORE PRACTICAL COUNSEL FROM THE EDGE GROUP

• "A number of our practice leaders have shared *Beyond Knowing* with both their clients and the professional staff in their offices. The book provides many helpful 'compass' guidelines that allow leaders to 'set their courses' and navigate their ways through critical practice leadership issues. The partners in our group find *Beyond Knowing* to be uniquely on point in addressing their needs as leaders in a highly-matrixed, consultative, professional services organization."

*R. Todd Rossel, National Director of Human Resources, Management Solutions & Services, Deloitte & Touche LLP*

• "*Beyond Knowing* has been a real hit and an inspiration ...Your insights cut across the spectrum of human nature, giving something of value to every reader."

*Donald J. Figura, Managing Partner, Wolf & Company*

• "Leadership is a critical issue in today's professional services company. As firms move to a more corporate environment, the advice and commentary in *Beyond Knowing* is not only essential but helps the firm leader maintain perspective. It's a must read for every practice leader."

*Jim Fitzpatrick, Partner, McGladrey & Pullen and Director of the McGladrey Network*

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*Professional Marketing, an international journal for marketing professional services.*

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A series of three instructional videos designed to help practice leaders conduct more effective group meetings.

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## PROGRAMS PROVIDED BY THE EDGE GROUP

This booklet has been carefully crafted to provide pragmatic and inspiring examples of the types of actions that effective practice leaders can take to accomplish extraordinary results within their firms. Frequently, though, firms benefit from a more in-depth treatment and wish to conduct workshops, training sessions, or strategic initiatives that enhance their objectives.

The Edge Group has developed a number of proprietary programs that enable you to help practice leaders and professionals understand and implement effective action plans.

The following programs are specifically designed to be delivered by your own professionals utilizing multiple video briefings, participant workbook materials, leader's implementation guides, on-site coaching of your internal leaders, and ongoing implementation assistance. An Edge Group partner is always available to guide your efforts and ensure that the program is appropriately focused and aligned with your firm's unique culture, circumstances, and goals.

### PRACTICECOACH®
A Comprehensive Management System For
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Transforming Best Intentions Into Best Practices
*featuring David H. Maister*

• "I must say, what you've done is unique. Leadership is today's crucial issue, and PracticeCoach® is the only thing out there that addresses it, that addresses how leaders actually function in the context of a professional services firm. But a lot of the pundits are just selling some rhetorical flavor of the month.

The problem is, for lawyers, words are action. Lawyers make their living uttering or writing words; that's their stock in trade. But in management, action is action, and you have to overcome the tendency, reinforced by years of education and training, of most lawyers to substitute words for action. My challenge, therefore, is to get the practice groups to do something.

My experience with PracticeCoach® indicates that it is an extremely useful tool for group leaders because it focuses on leadership and group dynamics in the context of actually doing something productive. It is by far the best product I've seen in this area. In fact, to my knowledge it is the only product that directly addresses this basic challenge of firm management."

*Robert E. Gilbert, CEO, Miller Canfield Paddock and Stone – Detroit*

This program is designed to assist practice leaders and the members of their practice group in accelerating their efforts toward developing high performance. The concepts and substantive material presented is above all practical, designed to be immediately applicable, the beginning of a continuous process for improvement, and intended to result in multiple, consistent, ACTIONS which collectively can make a competitive difference.

# PROGRAMS PROVIDED BY THE EDGE GROUP

The substantive material contained in PracticeCoach® is based upon the extensive work of David H. Maister as summarized in his best-selling books Managing The Professional Service Firm and True Professionalism, research collected since the books were initially written, and substantial new information acquired in the conduct of over 100 workshops with leaders of professional services firms world-wide. Together, David and the Edge partners developed the PracticeCoach® process as the means by which professional services firm leaders can expand their understanding of the ways truly distinguished performance can be instilled in firms.

## RAINMAKING®

A Client Relations and Business Development Training System

• "In our firm, we bought the Rainmaking program that The Edge Group put out which consists of print materials and videotapes that can be self taught within a group in the law firm. We must have put 40 - 50 people through the course. It is very practically aimed at getting client management skills across to younger lawyers. They know their stuff and the program works."

*Simon Chester, Partner, McMillan Binch - Toronto.*

This particular training system is designed to be completely self-contained, such that it can become your firm's own internal program, led by your own professionals, and capable of transferring skills that already exist within your firm, among some of your acknowledged business developers. There are currently over 120 firms world-wide using this program. In fact, our expertise in this area was acknowledged by the American publication" Of Counsel" where they declared that "the most popular curriculum among the U.S. firms surveyed was The Edge Group's Rainmaking program." The program covers fourteen different skill modules, each of which represents a stand-alone two-hour session for approximately nine to twelve participants.

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For the specific purview of the managing partner or practice group leader, we offer a confidential advisory service on important management and leadership issues. By virtue of a monthly retainer, we can be available to you by way of a convenient telephone, internet, video, or e-mail conference. We can be there to provide ongoing assistance in helping you find the best solutions to the challenges you face, or to act as a sounding board with your important strategic decisions. This is an insightful, responsive service that is designed to help firm leaders take action on those issues that require experienced outside counsel.

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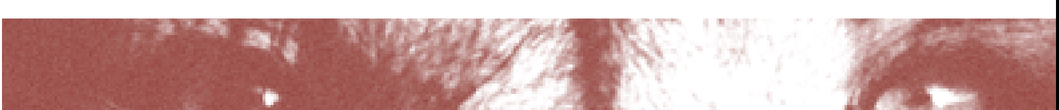

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18 specific guidelines on how to manage your professional services firm or practice group for extraordinary performance

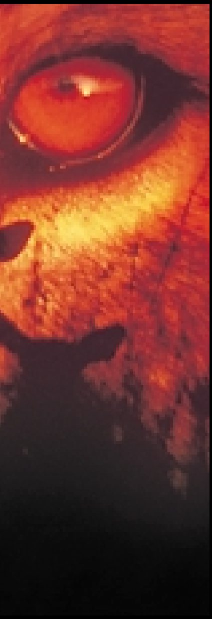
“This work is an arrow to the heart of the leadership matter. In the competitive environment faced by professionals today, classic management styles of the past simply don’t work anymore.

This incredibly pragmatic work by McKenna and Riskin is not only valuable, but crucial.

If there’s a more useful or practical view of the situation than you or I might have thought of, you can bet that these two will have found it - and you’ll find it in this comprehensive spectrum of leadership guidelines for the professional practitioner.

Any firm leaders who do not learn what’s in this handbook can expect to be surpassed in the marketplace by those who do.”

Bruce W. Marcus, author,
Competing For Clients In The 90’s
Editor, The Marcus Letter



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