MOTIVATING LAWYERS TO ENGAGE

A Case Study on Business Development Technology

BY KATIE RUTTER
Anyone who works with lawyers is well acquainted with the fact that lawyer personalities depart from the norm in some very signature ways. The infamous Altman Weil study profiling over 1,000 lawyers with the Caliper Profile personality test illuminated how most lawyers are impatient, skeptical, unsociable, highly autonomous and not very resilient compared with the general public. While these traits are ideal for defending arguments and heading off risky business decisions for their clients, they put lawyers at a disadvantage when it comes to business development. Given the increasingly competitive legal landscape and the change-resistant culture that prevails at most firms, marketing departments are being challenged to come up with creative ways to shift lawyer mindsets.

Goulston & Storrs rose to this challenge by incorporating technology into its business development efforts to form a robust training program. They created an initiative called the “Contribution Pipeline” that encouraged its lawyers to contribute to the future success of the firm by engaging in business development, both individually and collaboratively. Each practice area or industry group had a “contribution plan” that laid out business development strategies and tactics to deepen relationships and bring more business into the firm. The initiative provided lawyers with group coaching sessions, a pipeline management technology platform and accountability meetings with the firm’s business development manager. The initial pilot was a 2016 finalist in the LMANE Your Honor Awards for Practice Development and Client-Based Programs.

The Objective
Before incorporating software into its business development coaching initiatives, the scene at Goulston Storrs was one that will sound familiar to many firms. Its lawyers were open to business development in theory, but in practice they did not implement the behaviors needed to deepen relationships consistently.

The intention behind the initiative was to couple technology with coaching to keep contribution plans top-of-mind, to encourage lawyers to seek synergies with their peers in sales and service activities, and to hold them accountable to the business development action items in their plans.
The Initiative

In the past, coaching alone was insufficient to drive business development for the firm, so a pipeline management software platform called Practice Pipeline was introduced to help the lawyers stay organized and lend more structure to the coaching sessions. Pipeline management software, like CRM, is a type of software that helps users manage their relationships. However, pipeline management platforms tend to be more streamlined and simplified than traditional CRM, often making these platforms easier for busy professionals to use.

I was brought in as an external coach to facilitate monthly group coaching sessions with a committee of lawyers. I used the platform to track lawyer follow-through, help them create structured business development action steps and oversee lawyers’ activity to add accountability and make sure opportunities don’t fall through the cracks. During our group coaching sessions, we utilized the metrics reporting features of the software to gauge each lawyer’s progress and used these data points to brainstorm strategic ways for each lawyer to deepen their business development relationships.

The pilot had robust support from the firm’s client relations team, which kept the lawyers enrolled in the initiative and engaged in the process. They had assistance from the firm’s business development manager, who met individually with many of the lawyers to provide support and accountability.

The Outcome

The most immediate result of the pilot was that the lawyers showed an increased awareness and engagement in business development. We tracked this trend using the pipeline metrics, both individually and the firm as a whole. We were able to see engagement levels rising, lawyers completing their action steps more and more regularly, and we were able to immediately identify any lawyer who was not pursuing their action steps.

Prior to the Contribution Pipeline initiative, there was almost no interactivity between lawyers with their contribution plans. As a result of the pilot, not only did the lawyers become more engaged individually, they began to work together and identify synergies more frequently. Within the first few months following the pilot the firm saw an average 20 percent increase in “opportunity for cross-selling meetings.”

The accountability and transparency introduced by the Contribution Pipeline initiative has been highly effective in changing behaviors. Lawyers now meet regularly with the firm’s business development manager to discuss their action steps, and during our group coaching sessions we examine each lawyer’s score and pipeline dashboard, making it impossible for their steps to slip through the cracks.

Ultimately, the most important measure of success is new business for the firm. The very first matter attributed to the Contribution Pipeline initiative alone was greater than the dollar amount invested in the annual license of the tool.

While most of the lawyers in the pilot group adopted the software and participated in the coaching sessions, a few outliers were resistant to the process and eventually dropped out of the program.

Best Practices

Here are recommendations to any marketers seeking to undertake similar programs at their firms:
Whether you use your CRM software, a homegrown system on the firm’s intranet or a pipeline management platform, holding lawyers accountable for their action steps is the key driver to engagement.

1. **Select the right pilot group.** Not all lawyers will be open to participating or diligently working toward changing their behavior, so enlist those personality types who already “lean in,” but need a bit of focus and support.

2. **Understand that not everyone will be on board.** Be prepared for one or two of the lawyers you select to disengage — it’s not an indicator of failure, it’s just natural attrition. Replace them with lawyers who will be more engaged in the program.

3. **Be patient but persistent.** For most lawyers, business development requires venturing outside their comfort zone. Peer interaction and regular coaching meetings, whether one-on-one with a business development manager or in a group setting, are helpful for reminding lawyers that they are all in the same uncomfortable boat, and that it’s important to keep rowing.

4. **Transparency = accountability.** Employ a system that allows you to oversee each lawyer’s business development pursuits, activities and progress. Whether you use your CRM software, a homegrown system on the firm’s intranet or a pipeline management platform, holding lawyers accountable for their action steps is the key driver to engagement.

5. **Measure as much as you can.** While marketing metrics are notoriously difficult to compile and turn into meaningful intelligence, it’s easy to set a baseline of performance at the beginning of your pilot and measure how your key performance indicators have changed by the end of it. It will be easier to track proactive behaviors like “pitch meetings per month” or “number of business development touchpoints per week” than reactive indicators like RFPs received or matters won. Over time, an increase in meaningful proactive behaviors will result in new business.

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