



**Summary of Results from "Longevity Study" Interviews
With Five Legacy Faegre & Benson Partners Who Participated in the
2009 Business Development Coaching and Training Initiative**

September 1, 2014

I. Introduction

In a period of economic uncertainty and unprecedented change in law firms' business practices, Faegre & Benson (now known as Faegre Baker Daniels following a January 2012 merger with the former Baker & Daniels firm) made a significant investment in its future success by engaging some of its best and brightest junior partners in a one-of-a-kind professional development process. In spring 2009, 14 partners were identified by the firm's practice group leaders as rising stars and were selected to participate as "Clients" in the personal business development coaching process. After submitting a response to request for proposal and an interview process, Mary Kaczmarek of Skillful Means was selected as the coach and consultant for the process.

The firm also sought appropriate opportunities to engage an advisory group of more senior partners in the process and selected ten partners who demonstrate the attributes to be cultivated in the rising stars (the "Advisory Group"). The firm formed a steering committee consisting of its managing partner, the directors of professional development and marketing, as well as three Advisory Group members to oversee the program and coordinate involvement by the Clients and other Advisory Group members.

In addition to the personal business development coaching services provided to each Client, we wanted to develop and offer regular sessions of group programming for the Clients and, as appropriate, involving members of the Advisory Group. Among other benefits, the group programming would support the introduction of a firm-wide business development philosophy and vocabulary, and over time, promote peer coaching and mentoring among and between the Clients. The first group program provided the official "launch" of the personal marketing coaching process, and the final group session held in February 2010 concluded the process with participants focused on how they may continue to work together – formally or informally, as peer coaches to each other – to build the firm's practice.

Group program topics included, among others: best practices for business development; understanding how natural personality traits may impact the business building process; strategies for expanding key client relationships; and leading teams in business development efforts.

At the time the stated goals for attorneys' participation in the firm's initiative (as developed by firm leadership) were as follows:

- Acceptance of business development as an everyday activity, and demonstrating measurable results in terms of new clients and increased revenue
- Meaningful collaboration across practice groups – i.e., among and between litigation partners and corporate partners who formerly worked mainly with members of their own “tribe” – in connection with client pitches, strategic planning, and leadership challenges
- Development of a deeper understanding of the process of leading lawyers and thoughtful consideration of the role each participant should play in the continued growth of the firm
- Introduction of a firm-wide business development philosophy and vocabulary
- Establishment of influential relationships between participants to promote peer coaching and mentoring among and between them

During the month of August 2014 I conducted interviews with five of the 12 current partners who participated in the Program to understand their respective views regarding the long-term impact of their participation, as summarized below.

II. Most Significant Long-term "Learning" or Impact of the Program on Individual Partners

I asked each attorney interviewed if there was a particular aspect of the coaching and training initiative that resonated strongly with him or her. Here is a summary of the responses I received:

- **Retention of High Performing Junior, Now Mid-Level Partners.** Of the total group of 14 partners who participated in the 2009 program, only one (the only lateral partner in the group) has since left the firm to practice elsewhere; one other program participant or Client left the firm within the first month of the 2009 program. According to several of the Clients that I interviewed for this retrospective, the program was key to developing the loyalty of a group of high performing junior partners in the prime of their respective careers.
- **Particular Benefits for Women Attorney Participants.** In particular, the connections among the women attorneys who participated continue to be influential. At a tough time - right after the economic crises of 2007-2008 - the firm made an investment in its best and brightest upcoming attorneys, and according to one program participant, "we appreciated that."
- **Results of Individual Coaching are Retained.** According to another participant, "for me, the best part of the program was the individual coaching. When I find myself dealing with challenging work-related political situations, I often find myself asking, 'What would Mary tell me to do?' And I'm not just kissing your ass here - it's true!"
- **Appreciation of More than One Style of Building Business.** "What sticks with me to this day is the discussion regarding 'Sustaining Practice Styles,' i.e., the presentation on how some attorneys are more wired to focus on expertise versus relationship-building. Luckily for me, my target market seeks expertise and that's the way I sell my services to them - by writing and speaking, and otherwise promoting myself as a leading expert in my field of law. Up to that point, I mistakenly thought I would always struggle with business development because I'm not a 'people person.' I share this insight often with members of my practice group," according to another program participant. He also valued the work-related personality assessment profile and the group discussion of the importance of developing professional influence - not, as he put it, to manipulate others, but to be of higher and greater service to others.

- **Deployment of Natural Personality Strengths Catalyzes the Business Building Process.** One of the other program participants also mentioned the long-term significance of learning about natural personality strengths, and how to deploy them in successful business building initiatives. "Through the coaching and training, I learned about natural personality traits that support different aspects of business building - in my case, I like organizing events, networking at them and speaking. Since 2009 I've become an informal leader in my practice group by serving as a catalyst for different marketing events and activities. They don't necessarily benefit me directly, but I like using my natural skills and serving as a role model for others."
- **The Firm's Investment Was Appreciated.** One of the most gratifying retrospective comments came from a program participant who, though very accomplished, found herself struggling with the confidence needed to build business when she first joined the program in 2009. In our interview she said, "The firm's confidence in me - as evidenced by choosing me to participant in the program - helped me to develop my own professional confidence. The firm's investment in us has paid tremendous dividends over the past five years in our loyalty, commitment, and business development results."

III. Assessing Participants' Opinions of Long-term Impact of 2009 Program Participation

As described above, the 2009 Program planners identified specific goals for participation in the nine-month long program. Below I have summarized the Client/participants' views in 2014 as to whether they believe they continue to experience the results of achieving these goals, and whether they are able to point to concrete results related to achieving each.

- ***Acceptance of business development as an everyday activity, and demonstrating measurable results in terms of new clients and increased revenue***
 - "This goes without saying - but whether I follow through on a regular basis, that's another thing! I've gotten derailed by my leadership responsibilities, and I need to get refocused on developing a daily discipline."
 - "The business development behaviors that we learned have become part of the fabric of my day-to-day practice. And the results are there. For example, the largest protein producer in the world has become mine and the firm's client as a result of my understanding and implementing the business development process, and confidently and comfortably building the relationship over a period of time until the opportunity ripened. I no longer view business development as something I need to do in addition to my substantive work; it is woven seamlessly into the fabric of every day's work."
 - "Our work was a very meaningful turning point for me. At the time I was focused on developing the bench for our appellate litigation practice and I realized that if I was adding talent, I also had to focus on building business for the team. I definitely view business development as an important part of my everyday work. Because of the nature of my practice, I qualify myself for new opportunities through demonstrated expertise, in other words by winning cases, and then speaking and writing for relevant audiences. I have learned to seek out high level speaking engagements so I can get in front of and impress referral sources and other direct targets."

- "It's still a challenge to focus on business building every day - it depends on how busy I am with client work. But I am always aware of the importance of it, and I feel the impact on my practice when I let it go for a time. One thing I am always conscious of is maintaining my business development contacts list. "
- ***Meaningful collaboration across practice groups – i.e., among and between litigation partners and corporate partners who formerly worked mainly with members of their own “tribe” – in connection with client pitches, strategic planning, and leadership challenges***
 - "Participating in this program was especially critical for we 'people from the provinces' (i.e., outside the firm's traditional headquarters' office). The women partners in particular formed some important alliances with each other, and we continue to get together whenever we can; we view each other as members of an important peer group of colleagues who refer work to each other and otherwise collaborate on business growth initiatives."
 - "The firm's investment in us has paid tremendous dividends over time; its confidence in us has resulted in the development of our commitment to and confidence in our ability to build business on our own and collectively. I don't worry about approaching program participants to ask for help with business development efforts or to collaborate. We are very comfortable with each other, and as a woman partner I especially appreciate the effective collaboration I have with other women partners who participated in the program. For many of us working together in this way - across practice group and office lines - has become second nature."
 - "All of us in the original Business Development Program group consider each other to be partners in business building. I coordinate primarily with those in litigation practices - regardless of office - in these efforts."
 - "I have become much more aware of when I can create opportunities for other firm colleagues outside of my practice."
 - "We do create opportunities for each other regularly; we get each other and are very comfortable selling each others' capabilities."
- ***Development of a deeper understanding of the process of leading lawyers and thoughtful consideration of the role each participant should play in the continued growth of the firm***
 - "Because I was part of this program, I got to know firm leaders - who were engaged with us in the process - better than I would have otherwise. I learned so much about the firm's organizational/leadership process, and I think as a result I also was on the 'radar screen' of firm leaders regarding the role I might play in a management or strategy role. Today I am the office lead for the firm's Denver office, and I'm not sure that would have happened otherwise."
 - "We are regularly tapped for leadership - formal and informal - and other opportunities within the firm. Personally, I do not hold a formal leadership role but I have been instrumental in initiating ad hoc team business development efforts such as the Colorado offices' business development marketing committee. I also speak at the firm's Women's Forum events on a regular basis, and I'm on the firm's annual Food and Agricultural National Conference steering committee."

- After the program, I was tapped for a meaningful leadership position in the firm and I had some idea of what would be expected of me as a result."
- "I often serve as a catalyst or 'idea guy' for business development activities within my practice group; I don't always benefit from those personally but I like serving as an informal leader for these efforts. One thing you helped us to do was to understand how to use our natural strengths and interests in the business building process, and organizing group events and efforts are among my natural capabilities."
- "I feel much better about the firm and its prospects because many of the program participants - who I got to know better than I would have because of this program - are now in positions of leadership. I think that program participation had a very positive impact - and in many cases resulted in - the lack of attrition among high level performers."

- ***Introduction of a firm-wide business development philosophy and vocabulary***

As I started my in-depth interviews of the program participants with whom I spoke, I realized that asking about this particular item was redundant as achieving this particular goal may be assumed by the responses to whether the other items have been achieved. I decided not to ask about this item separately and therefore do not have specific comments related to it.

- ***Establishment of influential relationships between participants to promote peer coaching and mentoring among and between them***

- "As I mentioned before the bonds among participants has continued, especially among the women. We recognized each other as a group that had been singled out by the firm for a unique and important development opportunity, and for many of us this was a very meaningful recognition. For my part, for the first time in my partnership experience I felt like I was a part of a significant initiative, and it motivated me to continue to work with program colleagues to get to the next steps of career success."
- "Group members continue to mentor each other and partner with each other; we are true partners in the sense that we seek each other's advice not just on substantive issues, but with respect to the continued growth and development of the firm's business."
- "I don't think I would have ever known well the corporate practice partners in our group if I had not participated in the program. This program served as a great kick-start for me in breaking out of the narrow focus of my practice to think about firm colleagues as collaborators in building business and as targets for my efforts."
- "Yes, we definitely have a stronger and continuing bond among us. I don't pitch for work together with anyone outside the corporate attorneys who participated in the program though."

- "All law firms sell 'teamwork' as part of their culture/services but this initiative truly fostered it among those who participated. The bond among us continues; participating in the program created a sort of internal 'platform' for us to work together from. I feel that in many ways we have - and will continue to - promote positive change for the firm. As a result of our success we are all in the mainstream of the firm's business and culture and that gives us influence over its future."

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