NALP 2010 Annual Education Conference

Designing Data-Driven PD Initiatives

How to use readily available data to create and implement high impact PD initiatives

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Significant Professional Relationships:
Which Are Working Well? Which Need Work?

List the names of two to four significant work relationships. Rate the relative importance of each to career development as follows: "1" means "extremely important;" "5" means not at all important. Rate the current status of those relationships as follows: "1" means "excellent;" "5" means "poor."

Relationship	Relative Importance (1-5)	Current Status (1-5)
Assigning Attorneys: **1.** **2.** **3.** **4.**		
Practice Group and Firm Leaders: **1.** **2.** **3.** **4.**		
Peers: **1.** **2.** **3.** **4.**		
Other Constituents: **1.** **2.** **3.** **4.**		

Timeline for Development and Presentation of the Performance Management Track Program, "Introduction to Relationship-Building"

PHASE I – Content Development and Program Design (including Alpha Testing)

Activity	Responsible Party	Deadline
Develop a proposed list of competencies associated with relationship-building and relevant examples that evidence a high level of performance of each	Skillful Means	March 28
Teleconference to discuss and refine list of proposed competencies and examples evidencing high level performance	Faegre and Skillful Means	April 1
Develop a proposed draft of questions to be posed to senior associates and to Firm leaders	Skillful Means	April 1
Identify five senior Faegre associates who evidence competencies and five Firm leaders to seek input on program content and request their involvement in program development process	Faegre	April 4
Provide feedback on draft questions to be posed to senior associates and to Firm leaders	Faegre	April 4
Conduct interviews with senior associates and Firm leaders	Skillful Means	April 7 – 10
Provide summary of interview results and draft of on-line survey questions for all associates who will participate in training	Skillful Means	April 11

Identify participants for and schedule alpha training program to be held in the Minneapolis office in the first week of May	Faegre	April 15
Revise and distribute on-line survey	Skillful Means	April 15
Present summary of on-line survey results and first draft of program outline based on all input obtained to date	Skillful Means	April 21
Teleconference to discuss summary of on-line survey results and first draft of program outline	Faegre/ Skillful Means	April 25
Revise program outline; prepare and present program script, slides and handouts	Skillful Means	April 30
Present alpha training session in Minneapolis office; conduct evaluations on program content and design	Skillful Means	Week of May 5
Discuss evaluations and implications for next iteration of program and materials	Faegre/ Skillful Means	Week of May 5
Revise and seek feedback on next version of program materials	Skillful Means	Week of May 12
Teleconference to discuss program materials and complete programs and materials	Faegre/ Skillful Means	Week of May 12

Phase II – Presentations and Follow Up Group Coaching

Determine training participants and schedule live sessions in each of the four U.S. offices	Faegre	April 15
Present live training sessions in each of four U.S. offices and schedule two follow up group coaching sessions for the weeks of June 2 and June 23; assign learning partners	Faegre/ Skillful Means	Week of May 19
Distribute and analyze live program evaluations to develop approach to group coaching content / process	Skillful Means	Immediately following each live program and into week of May 26
Prepare materials for group coaching sessions including ground rules	Skillful Means	May 28
Provide feedback on group coaching materials and ground rules	Faegre	June 2
Conduct first session of group coaching	Skillful Means	Week of June 2
Conduct second session of group coaching	Skillful Means	Week of June 23
Distribute on-line evaluation of group coaching process	Skillful Means	Immediately following each second group coaching session
Prepare evaluation summary	Skillful Means	Week of June 30

List of Capabilities Associated with Developing Positive Professional Relationships and Related Examples of Each

1. **Treating colleagues who assign work as clients**
   - Developing a service-oriented mindset and approach
   - Maintaining professional standards in demeanor, speech and dress (vs. being overly casual or familiar)
   - Being open to coaching and mentoring (i.e., to being shown a "better way")
   - Meeting deadlines
   - Producing high quality work product (vs. "second best" because "this is just for internal use")
   - Investing non-billable time to exceed expectations

2. **Listening well**
   - Providing non-verbal and verbal cues that demonstrate focus and understanding
   - Maintaining appropriate eye contact
   - Paraphrasing key comments/requests
   - Asking appropriate follow up questions
   - Avoiding interrupting or finishing sentences/comments

3. **Seeking to understand clients' expectations for service and to meet them**
   - Taking responsibility for eliciting all relevant information related to an assignment or request
   - Confirming deadlines
   - Understanding the specific "deliverable" that is to be produced
   - Asking for contextual information about the project to better understand the specific assignment
   - Asking follow up questions in a timely way to ensure that deadlines will be met
   - Following up after the assignment is completed to obtain feedback and suggestions for improvement

4. **Building positive rapport with internal and external clients**
   - Seeking feedback on relationship building "blind spots" or problem areas and addressing those to improve interpersonal rapport
   - Mirroring key aspects of clients' communication and relationship-building styles
   - Guarding confidential information
   - As appropriate, taking time to learn more about clients' professional goals and priorities and how you may support their achievement

5. **Appreciating diversity among clients and colleagues**
   - Recognizing that diversity is an organizational asset
   - Developing and demonstrating a comfort level in working with individuals of different gender, race, age, background and personality type
   - Focusing on clients and colleagues as individuals rather than as members of a group
   - Treating all colleagues and clients fairly and with respect

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6. **Delegating well and appropriately to more junior colleagues and staff**
    - Identifying the appropriate resource for each delegated project or assignment
    - Explaining what is expected in terms of results and time frames, and taking time to answer questions
    - Allowing time for follow up questions
    - Resisting “reverse delegation”
    - Providing appropriate and timely performance feedback

7. **Recognizing performance short-falls with clients (internal and external) and seeking to address them proactively**
    - Recognizing that mistakes and performance short-falls will occur from time to time
    - Understanding that occasional interpersonal conflict is a natural part of doing business
    - Committing yourself to addressing client-related problems promptly and well
    - Giving permission to others to raise problems with you, before those problems occur
    - Depersonalizing discussions about work-related conflict
    - Taking responsibility for mistakes and proposing remedies to correct them

Questions for Firm Leaders on "Best Practices" for Relationship-Building

1. What do you know now about building positive professional relationships that you wish you had known when you first started practicing law?

2. What challenges are there for junior associates when it comes to building positive professional relationships?

3. How would you describe the Firm's "brand" – i.e., what it is known for among other attorneys and clients - when it comes to building positive relationships internally and with clients?

4. What key practices do you recommend to junior associates to promote the development of positive professional relationships?

5. On a scale of "1" to "5" where "1" means "this capability is critical to building positive professional relationships" and "5" means "this capability is relatively unimportant for building positive professional relationships" rank the items listed below:

a. Treating colleagues who assign work as clients
b. Listening well
c. Seeking to understand clients' expectations for service and to meet them
d. Building positive rapport with internal and external clients
e. Appreciating diversity among clients and colleagues
f. Delegating well and appropriately to more junior colleagues and staff
g. Recognizing performance short-falls with clients (internal and external) and seeking to address them proactively
h. Working well as a member of a client service team

6. Explain the reasons for your ratings on each capability listed in #5.

7. On a scale of "1" to "5" where "1" means "associates here have many opportunities to develop this capability by observing others performing it well or through training," and "5" means "there is little or no opportunity for associates to regularly observe others performing this capability well and/or to receive training on it," rank the items listed in #5. Explain the reasons for your ratings.

8. Are there other capabilities related to building positive professional relationships that you would add to the list under #5? If so, what are they and why?

Questions for Associate Interviews on "Best Practices" for Relationship-Building

1. What do you know now about building positive professional relationships that you wish you had known when you first started practicing law?

2. Who do you consider to be the primary "targets" for building positive professional relationships during the first four years of practice?

3. How did you learn to build positive professional relationships?

4. What key practices do you recommend to more junior associates to promote the development of positive professional relationships?

5. On a scale of "1" to "5" where "1" means "this capability is critical to building positive professional relationships" and "5" means "this capability is relatively unimportant for building positive professional relationships" rank the items listed below:

i. Treating colleagues who assign work as clients
j. Listening well
k. Seeking to understand clients' expectations for service and to meet them
l. Building positive rapport with internal and external clients
m. Appreciating diversity among clients and colleagues
n. Delegating well and appropriately to more junior colleagues and staff
o. Recognizing performance short-falls with clients (internal and external) and seeking to address them proactively
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8. Are there other capabilities related to building positive professional relationships that you would add to the list under #5? If so, what are they and why?

Relationship-Building Tool #1:
Establishing Client Service Expectations

1. Accept responsibility for obtaining all relevant information related to an assignment

- *"We've gone over the deadline, how much time you think I should spend on the initial assignment, and the resources you want me to begin with. Is there anything else I've missed?"*
- *"I have a few additional questions, but I know you don't have time right now to go over them. Shall I get started on this, or would you like me to check back with you later to get more information before I begin?"*
- *"I see that you need to get to other things now. Is there someone else working on the project from whom I may obtain additional information if I need it?"*
- *Other:*

2. Ask for contextual information about the project in order to understand the specific assignment

- *"It will help me to understand how this assignment fits into the overall project you are working on with the client. Could you give me some additional information?"*
- *"I'm trying to learn more about the Firm's work with this client. Do you have time to talk with me a bit about the client relationship and the overall assignment you are working on right now? That would be very helpful to me."*
- *"Thanks for the opportunity to work on this project. At my stage of practice, it's not always clear to me how the work I am doing relates to the overall assignment for the client. Could you explain that to me?"*
- *Other:*

3. Ensure that deadlines will be met by asking follow up questions in a timely way

- *"You mentioned that you will be traveling this week. If I have questions about the assignment, shall I try to reach you or is there someone else I can follow up with in your absence?"*
- *"I believe I understand what you need me to do. But if I do have additional questions, what's the best way to get in touch with you?"*
- *"I'm going to get started on this now. As I get into it, I may have some follow up questions. Is it okay to call you about those or shall I send an email?"*
- *Other:*

Continued >>>

4. **Get specific information about the deliverable you are expected to produce (written/verbal; draft/final version, etc.)**

   - *"It sounds like there's a tight deadline here. Shall I give you a verbal report, a short email message with my findings or would you prefer a memo with cases attached?"*
   - ***"****I'm glad to have the chance to work with you on this project. Because we haven't worked together before I want to understand specifically what it is I should do to be successful on this project."*
   - *"Do you want me to report directly to the client on this, or shall I run the information by you first?"*
   - *Other:*

5. **Review expectations, especially deadlines**

   - *"I think I've got everything I need. Let me just quickly go through what it is you need me to do and then I'll get going on this."*
   - *"Here's what I wrote down regarding what you need me to do and by when. Please correct me if I've gotten anything wrong."*
   - *"Okay – here's what I wrote down regarding your expectations. Let me just summarize this quickly so I can make sure to get this to you exactly the way you want it."*
   - *Other:*

6. **Elicit feedback after the assignment to determine how well expectations were met**

   - *"When I'm done with this assignment, I'd like to figure out a time when we could get together so that I can get your feedback on what worked and what could have been improved. Will that be okay?"*
   - ***"****The assignment is done, and I believe I followed all of the instructions you gave for it. I have a few questions I'd like to ask so I know if the work I did was acceptable to you. Do you have time now, or may I call you to set up a time to get together?"*
   - ***"****I'd really appreciate your feedback on this assignment. Do you have time for lunch next week so we can talk about it?"*
   - *Other:*