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# **Sample Protocol Interview & Scorecard**

This educational material is being provided to NALP as part of its 2017 Annual Education Conference.

## 1. Values Others in Support of Team

Can you tell me about the lawyers and support staff that you work with at [lawyer's current firm]?

- Who are your most valuable team members?
- Who have you worked with the longest?
- How do they either support your practice or help you service your clients?
- Why do you like working with them?

### D (1)

- Focused on own priorities; does not share information with team
- Unaware of roles, responsibilities, timeliness and contributions of other professionals/staff
- Has air of self-importance and thus expectations for white-glove recruiting efforts
- Slow to take responsibility for bad outcomes
- Emphasizes weaknesses and shortcomings of others
- Appears super or overly-confident; lots of bravado

### C (2)

### B (3)

- Accessible and approachable work style
- Responsive in communications
- Adds energy to room
- Treats everyone equally; encouraging and supportive of diversity
- Sense of humor; laughs at self
- Focuses on fixing mistakes; is slow to assign blame
- Welcomes contributions from all members of the team

### A (4)

## 2. Flexible and Open to New Ideas

The practice of law is changing rapidly. Can you think of a recent example where either you or your firm were faced with an internal or external challenge that required an innovation or a significant change in firm policy?

- What was the situation?
- What was your role in the decision making process?
- Did anyone else play an important role in either the strategy or implementation?

### D (1)

- Is wedded to his/her way of problem solving
- Finds it difficult or painful to explain assumptions
- Is resistant to objectively considering new alternatives
- Is skeptical of feedback, including from client; explains why feedback need not be acted upon.
- Generally does not seek out views of others
- Tends to categorize, criticize, and caricature the views of others; slow to see virtues

### C (2)

### B (3)

- When confronted with constraints, generates creative solutions
- Open to new ideas of others
- Is a careful listener in meetings
- Asks thoughtful follow-up questions
- Welcomes contributions from all members of the team

### A (4)

## 3. Low Management Overhead

Can you describe your current relationship with your firm's leadership?

- What roles have you been assigned in firm governance?
- To what extent has senior leadership been responsive to your request for support?
- What is your preferred method of communication – email, meetings, phone calls?

### D (1)

- Imposes rules for who he/she is willing to work for.
- Does not read communications from management
- Requires special attention regarding committee work (e.g., will important work get done? will personalities clash?)
- Longwinded and/or contentious in meetings

### C (2)

### B (3)

- Accepts important assignments despite time pressure and personal inconvenience
- Completes assignments on time
- Does not feel compelled to take up air time in every meeting
- Can be counted on to support firm initiatives because they reflect decisions of leadership

### A (4)

## 4. Helps Hire and Develop Junior Talent

### How important are associates to your current practice?

- Over the last five years, can you tell us about one or more associates who have been very important to your practice?
- What are their strengths and weaknesses?
- What role did you play (or are currently playing) in their development?

#### D (1)

- Fails to provide a clear picture of the lawyers who do his or her work; does not articulate their skills and contributions
- Provides few or weak examples of delegating work for purpose of developing skill sets
- Provides few or weak examples of junior lawyers whom he/she was mentored to partnership
- Feedback/Reviews?

#### C (2)

#### B (3)

#### A (4)

- Actively recruits/makes him/herself available willingly
- Views talent development as an important part of his or her practice and also important to the firm
- Can articulate how he/she acquired key practice skills; can explain how he/she are developed those skills in others.
- Can articulate the various skills, strengths, weaknesses, and gaps on current team; has plan for managing and improving team

## 5. Strong Business Hygiene

### What is your firm's current policy on timekeeping and billing?

- Over the last three years, what percentage of your work is billed and paid within 30 days? 90 days?
- Do you have a standard practice or procedure for getting your bills out?
- What instructions do you give to the lawyers and paralegals you supervise? How do you monitor compliance?

#### D (1)

- Lacks a structured process for billing and timekeeping
- Lacks ability or will to delegate clerical tasks
- Blames clients for excessive write-offs and right downs
- Careless/Lazy about completing the required forms; everything takes longer than it should (LPQ, conflicts).
- Slow in sharing information; sloppy/unprofessional document presentation

#### C (2)

#### B (3)

#### A (4)

- Clear process and path of delegation for business aspects of practice
- Efficient with time and time entry
- Gets bills out on time and accurately
- Clients pay bills on time with little discounting or noise
- Maintains his/her own records on collections and other data history

## 6. Develops and Maintains Substantial Client Relationships

### Think about the three most significant clients you have serviced over the last three years – significant because of total revenue/profitability or because of long-term value to your career. How did you establish these relationships?

- What criteria do you rely on to assess that the client is happy and feels he/she is getting excellent value?
- How do these clients feel about your current rate structure?
- How will the move to our firm affect these client relationships?

#### D (1)

- Client base is primarily inherited from others
- Difficulty articulating cross-selling strategies
- Small, undiversified client portfolio
- Can't explain case staffing strategy
- Doesn't have other partners who may be concerned about a departure and/or no associates who would follow
- Several job changes without strong explanations/not asked to follow departing partners

#### C (2)

#### B (3)

#### A (4)

- Articulates how clients will benefit from movement to new firm.
- Can explain how he/she acquired clients and maintains relationships
- Has a clear strategy for building expertise/skills and marketing that to prospective clients
- Provides recent examples of referrals from clients and/or colleagues; cogently explains basis for referrals
- Can explain how he/she discusses price with clients

## 7. Leverages Firm's Lawyers, Staff, and Resources

At your current firm, do you have much reliance on non-legal professionals, such as specialists in marketing, pricing, project management, talent management, or client-facing technology?

- Which professionals have proved most valuable? Why or how?
- What opportunities to you see with the resources at our firm?

D (1)	C (2)	B (3)	A (4)
<ul style="list-style-type: none"> <li>• Is not conversant on the business of law</li> <li>• Fails to provide examples of using allied professionals to support and grow practice (e.g., budgeting, pricing, marketing, professional development)</li> <li>• Lacks thorough knowledge of current firm's capabilities; unable to give a balanced, reasonable critique of what needs to be improved.</li> </ul>			<ul style="list-style-type: none"> <li>• Has a clear and reasoned perspective on how the practice of law is changing</li> <li>• Can explain how he/she staffs cases; evidence of success with diversity and inclusion on teams</li> <li>• Can explain how he/she leverages firm resources: Recruiting, Marketing, Finance (AFAs)</li> <li>• Provides examples of successful pitches / RFPs to win new clients</li> <li>• Provides examples of how effective case management is growing work for existing clients.</li> </ul>

## Scoresheet

Success Factor	Interviewer 1	Interviewer 2	Interviewer 3	Interviewer 4	Consensus Score
Values Others in Support of Team					
Flexible and Open to New Ideas					
Low Management Overhead					
Helps Hire and Develop Junior Talent					
Strong Business Hygiene					
Develops and Maintains Substantial Client Relationships					
Leverages Firm's Lawyers, Staff, and Resources					
<b>Overall Score</b>					

## Presenters



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