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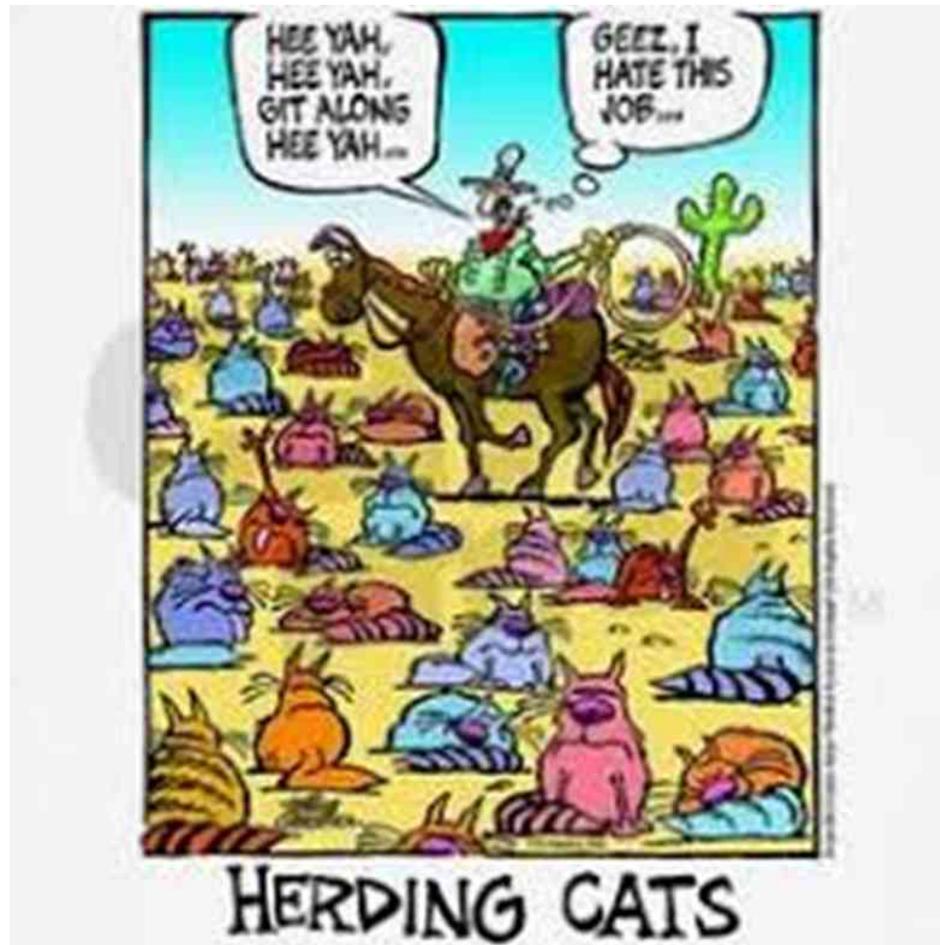
Herding the Cats that Herd the Cats A Blueprint for Practice Group Leader Training



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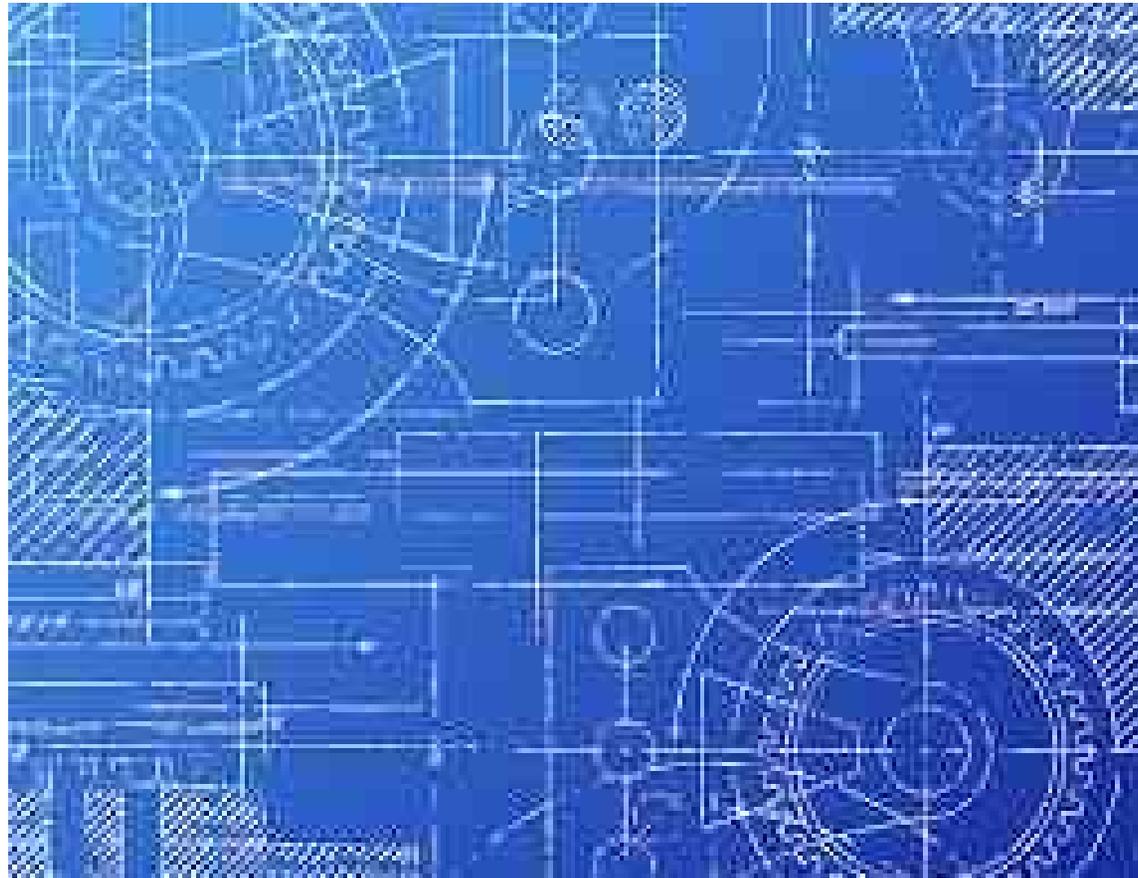
What Does Practice Group Leadership Look Like at your Firms?



What challenges are you facing?

- No structure?
- No job description?
- Wrong people?
- Not equipped to lead?
- Lack of cooperation?
- No support?

A Blue Print to Solve Your PG Problems



What is the Role of a Practice Group Leader?

Step 1: Job Description

- Roles and expectations
- Focus Groups
 - What do they do?
 - What do they need?
 - What obstacles do they face?
 - What are the Firm s goals relating to PG Leadership?

Role of Practice Group Leader

- Communication
- Leadership, Direction and Planning
- Recruitment and Integration
- Firm and Group Strategic Planning
- Business Development
- Professional Development
- Financial Management

Step 2: Design a Training Module

- Define goals of the program
- Top down initiative
- Provide tools to succeed
- Training
- Follow up
- Culture of accountability

Different Approaches

M U C H *S H E L I S T*

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M U C H *S H E L I S T*

Leadership

- Communication
- Leadership, Direction and Planning
- Recruitment and Integration
- Strategic Planning
- Business Development
- Compensation
- Client Service
- PD
- Client Intake
- Financial Management

M U C H *S H E L I S T*

Training

- One on One Counseling/Coaching
- Dealing with Difficult Conversations
- Group Collaboration
- Effective Meetings
- Differentiation/Value Add

M U C H S H E L I S T

Results

- Formal PGL meetings 5x a year, individual Meetings with PGLs 1x a year
- Tracking time
- Formal agendas and regular meetings required
- 1 on 1 meetings with associates and partners 1x per year
- Monthly reports

M U C H *S H E L I S T*

Results

- Better recruiting
- More efficient client intake
- Less communication lapses
- Accountability on hours and commitment
- Cross marketing and informal networking



Homework #1

Prepare Your Getting to Know You Presentation

- About Your Practice Group
- Key Clients and Industries
- How Work is Sourced
- What We Do Best

“Should take no longer to recite than it would take to sing Happy Birthday. Be broad but simple.”

About the Practice Group

- **Our lawyers try cases.**
- We try cases
 - Of virtually **every kind** and size,
 - In any jurisdiction, before any tribunal (state and federal courts and arbitrations),
 - Between businesses, between a business and the government, or involving an individual when the amount in controversy or principle at issue is substantial.
- We have a **national practice** with a wealth of experience in the courts of the District of Columbia, Virginia, and Maryland. We are ranked by **U.S. News & World Report “Tier 1”** in the Baltimore/DC Market for Commercial Litigation.
- We frequently **work with other practice groups**, not only to litigate active disputes but also to counsel clients entering into a transaction, complying with the law, or anticipating disputes.
- “South” is an internal designation only, encompassing lawyers resident in the D.C., Tysons Corner, and Rockville offices. There are **32 timekeepers** in our group.

Key Clients and Industries

Clients

- NALP
- Acme Pharmaceuticals
- Hales Hotels International
- Minicom
- Microstar.com

Industries

- Pharmaceuticals
- Real Estate
- Healthcare
- Hospitality
- Financial Services
- Retailers
- High net worth individuals and public figures
- Construction

How Work is Sourced

- **Externally:** Our work comes mostly from our reputation for trying cases and relationships, to some extent from publicity, and least from RFPs or “cold” marketing efforts (seminars etc.). We receive referrals from clients, former clients, and other lawyers. Existing clients who trust us from their litigation experience with us also bring non-litigation matters to the Firm.
- **Internally:** We have a network of relationships with other practice groups. Other practice groups are not only referral sources but also are our clients: they consult us on ad hoc issues in anticipation of litigation or in connection with a client’s transaction or compliance effort.

What We Do Best

- All of our lawyers have **actual trial experience.**
- We can jump into any subject matter and get up to speed quickly, with the coaching of subject-matter experts in other practice groups.
- We have deep experience in certain subject areas: antitrust, real estate, advertising, breach of contract and business torts (fraud), trademark and unfair competition, partnership/ownership, commercial lending, bankruptcy, defamation, privacy, consumer protection, class action defense, government contracts, securities, patent infringement, employment, trade secrets, construction, white collar crime, civil rights, insurance coverage, tax, trusts and estates.
- With some exceptions, including *pro bono* cases, we generally do not enter appearances in court cases where the amount in controversy is less than \$200,000, domestic disputes, or plaintiff’s personal injury claims or medical malpractice.

Homework #2

Read Memo About Practice Group Leadership

- From Management Committee to PGLs
- Roles and Expectations for Leadership
- 3 Pillars
 - Professional Development
 - Business Development
 - Financial Results
- Jot down best practices and challenges in each area

Homework #3

Identify Cross-Practice Opportunities

- Identify 4-6 clients serviced by their practice group that they believe has potential, unmined need for services in other practice areas
- What has been an obstacle?
- What type of partner or contact could be helpful?

Venable Academy Agenda

Day One

- Registration
- Discussion of goals of the Academy
- Presentations by groups, offices, strategic initiatives
- Cocktail reception
- Dinner at a partner s home

Venable Academy Agenda

Day Two

- Round-robin breakout to exchange best practices for managing groups and offices
- Round-robin coaching breakout to discuss business development challenges and opportunities
- Closing and action steps session



Best Practices: Financial Performance

Data Analysis

- Use firm data to ensure that members of the Practice Group comply with the firm's time entry policy (or client's often more stringent policy)
- Use data to realize
- Use the overview
- Post-p
- Define work, f

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Best Practices: Professional Development

Fair Work Distribution and Supervision

- Give the associates a sound byte for unexpected projects. "I just need to clear this w/ PGL or I will get in trouble."
- Every Wednesday send an e-mail with projection of Sunday to Sunday. You already know the workload when you get outside requests.
 - Billable time broken down by document review and non-doc review.
 - Include non-billable stuff.
 - What do you see coming down
- Have a 15 minute partner call with associates. Helps with work on outside matters.
- When you have work that need out who to go to.

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Best Practices: Business Development

1. Improve internal Knowledge Management/search

On Intersect and elsewhere so we have better ways to figure out who does what ("Real Estate Facebook")

2. Involve associates in BD early

Formalize partners' roles in developing associates' BD skills

- Doug's email to associates (catalog experience and figure out your gaps, contacts, short and long term goals, your/my accountability, mentorship, attitude = confidence; everything is a BD activity)
- Involve in pitch prep, actual pitches
- *Totem pole* approach – get to know your peers – paralegals/secretaries too
- Bring associates to events/ ask them to come out w/ an action item

3. Give and take

Client targeting exercises in which people approach RPs asking for "door opening," but also offer the same.

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Follow Up

- Getting to Know Master Book
- Best Practices
- Metrics Books
- Program Survey

Most Helpful Topics:

Very motivating and informative; you can tell who's truly interested in collaborating
Great to understand what others do (or don't do) each day in running the PG
Hearing about challenges
Relearning what the firm does

What Could be Improved:

Pre-Academy survey about time spent on various functions for comparison and what to discuss
Business development section should include key client relationship partners

Length of Academy:

92% Just Right (One said too long)

Lessons Learned

What is the one thing you will bring back to your firm?

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