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2012

## Partner Leadership Training in Mid-Sized and Regional Firms

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David Cruickshank, Partner, Edge International  
Andrea Nauf, Director of Prof. Development, McInnes Cooper  
Susan Wagner, Director of Prof. Development, Baker Donelson

## Agenda

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- Overview of two programs
- Effective and ineffective Leaders
- A leadership framework and assessment
- Sample ongoing leadership projects
- Getting launched and obstacles
- Benefits, feedback, recommendations

## Objectives

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### Train leaders or successors?

- Increase effectiveness of existing leaders
- Identify and train potential leaders
- Increase effectiveness as lawyers or as firm leaders?

### Audience

- Current leaders
- “Potential leaders” (selection process?)



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## Objectives

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### Skills

- (Rainmaking)
- Supervisory, incl. delegation, feedback, motivation, difficult conversations
- Team leadership, incl. leading up
- Project management
- Change management



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## In-House or Out

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### Out (Harvard, CCL, etc.)

- Network with leaders from other firms and industries
- Focus on individual skills

### In-house

- Network with colleagues from other practice groups and offices
- More collaborative, with focus on the firm
- Less costly; more participants
- More flexibility



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## What we decided:

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In-house, with FirmLeader



Steve Armstrong



Tim Leishman



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## What we decided:

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Existing firm leaders – approximately 65

- CEO, COO
- Board of Directors
- Practice Group Leaders (and their deputies)
- Office Managing Shareholders (and their deputies)
- Client and industry service team leaders
- Firm-wide committee and task force leaders
- Office recruiting committee leaders



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## Program Objectives

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1. Provide time to reflect on your leadership styles and habits
2. Expand your leadership skills and tactics
3. Exchange experience and wisdom with each other
4. Plan the next steps for a new or existing leadership initiative that will be a “lab” for building leadership skills



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### Schedule

Leaders Academy I		Leaders Academy II
May 2011	Launch Meeting (VC)	August 2011
June 2011	Opening Workshop	September 2011
	Small-Group Meetings (VC)	
April 2012	Closing Retreat	April 2012

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**LEADERS ACADEMY**

## McInnes Cooper

- Founded in 1859
- One of the 20 largest law firms in Canada
- 200+ lawyers, 7 offices
- Clients across North America



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# Program Participation

## Firm-Wide Leadership Team



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# McInnes Program at a Glance

Prepare and assess	Workshop	Follow through
<ul style="list-style-type: none"> <li>• Define leadership behaviours</li> <li>• Leadership Contracts</li> <li>• LPI Self-Assessment</li> <li>• Individual Profiles</li> <li>• Case Study</li> <li>• Leadership Project</li> </ul>	<ul style="list-style-type: none"> <li>• one day off-site facilitated by David Cruickshank</li> </ul> 	<ul style="list-style-type: none"> <li>• Leadership Projects Launch</li> <li>• Quarterly Meetings</li> <li>• One-to-One Coaching</li> <li>• Repeat LPI Self-Assessment</li> <li>• Observer Assessments</li> <li>• Wrap-up and Debrief</li> </ul>

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## Preparation & Assessment

- **What matters?**

Influence Others to Follow		<b>MODEL THE WAY</b>
Set Direction and Purpose		<b>INSPIRE A SHARED VISION</b>
Do the Tough Stuff		<b>CHALLENGE THE PROCESS</b>
Achieve Goals		<b>ENABLE OTHERS TO ACT</b>
Motivate Others Through Recognition		<b>ENCOURAGE THE HEART</b>

- **Desired behaviours and outcomes**

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## Preparation & Assessment

- **Committing to the leadership contract**

- Leadership is a decision – choose to lead
- Leadership is an obligation – step up
- Leadership is hard – get tough
- Leadership is a community – connect with others

- Vince Molinaro, Managing Director – Leadership Solutions, Knightsbridge

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## Preparation & Assessment

- **Self-Assessment: Leadership Practices Inventory**
- **Individual Profiles:**
  - Lawyer-Leaders – practice vs. leadership time
  - Professional Leaders – leadership vs. operational excellence
  - Snapshot of leader main issues/challenges
  - Desired workshop topics
- **Case Study: Producer-Leader Dilemma**
- **Leadership Project:**
  - Choose one project to tackle over the next 12 months to advance leader mandate

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## Preparation: before the opening workshop

1. Attend the launch meeting
2. Complete the online Myers-Briggs questionnaire
3. Choose a leadership initiative to serve as a “lab” for trying new methods and building leadership skills
4. Read a case study

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## Leadership Behaviors and Traits

Effective?



Ineffective?



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## Leadership Practices WORKSHOP OBJECTIVES

- Describe The Five Practices of Exemplary Leadership®
- Relate how The Five Practices apply to your leadership
- Use LPI feedback to identify your leadership strengths and weaknesses
  - Connect a project to firm strategy
- Choose actions for improving your ability as a leader

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THE FIVE PRACTICES

-  Model the Way
-  Inspire a Shared Vision
-  Challenge the Process
-  Enable Others to Act
-  Encourage the Heart

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## At the Workshop

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- In common?
- Differences?



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## Follow Through

- Leadership projects launch
  - Leaders liaise with David Cruickshank and Director of PD to define projects with measureable objectives and confirm connection to firm strategy
  - Leaders meet individually with Managing Partner and Director of PD to obtain 'buy-in'
  - A 'paired' approach
- Regular leadership team progress updates with David Cruickshank
- Coaching Support – leadership projects and leadership practices

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## Follow Through

- Did we move the bar?
  - Self-Assessments
  - Observer Assessments
  - Leadership projects completion
- Wrap up and Debrief



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## Follow Through: Small-group meetings (VC)

- Small groups (4-5 participants) were a mix of offices and leadership roles
- Meetings (VC) lead by consultants
- Every other month
- Participants discussed initiative progress and obstacles
- Leaders II also had “accountability buddies”



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## Leadership initiatives(projects): description

- Provides an opportunity to refine or expand your usual leadership methods and styles (that is, pushes you out of your comfort zone)
- An important initiative that you would pursue anyway. It can be a new one or an existing one that still requires a lot of work.
- Requires you to collaborate with others to achieve your goal



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## Leadership initiatives: examples

- Practice Group Leader: improve and expand KM content on the group's intranet site
- Project management task force leader: successfully merge Litigation Support Department with Legal Project Management Office
- IST leader: increase her group's visibility and client base in a neighboring state
- Office Managing Shareholder: recruit laterally to strengthen a particular practice area in his office



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## A Deeper Dive: Examples of Projects



- “Create functioning and profitable client service teams for 2 of our most important clients, X & Y by April 30, 2013”
- “Reduce reactive service calls by x% through more proactive service by April 30, 2013”
- Measureable, SMART



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## Reflection: Obstacles

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- Demands of practice v. time to lead
- Steep learning curve for some

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## Reflection: Benefits

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- Opportunity to reassert strategy across region
- Leadership projects with measureable objectives tied to strategy
- Consensus of leadership team of leadership profile and what matters
- Self investment and having 'skin in the game'
- Geographical barriers eroded

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## Reflection: Investment

Per head, less than



**10,000**

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## Follow Through: Closing workshop

- A. What were we talking about last year....? A refresher
- B. Lessons from experience I: What have we learned?
- C. Applying MBTI to managing change
- D. Lessons from experience II: What have senior leaders learned?
- E. Managing individual resistance to change
- F. Refreshing your agenda
- G. Managing collective resistance to change
- H. Looking ahead



## Feedback after workshops

Participants loved:

- The consultants and overall program – high marks, great comments, good buzz
- Bonding
- Exchange of ideas among participants
- Mix of tenure, offices, and practices
- Group exercises and discussions
- Myers Briggs analysis
- Presentations on leadership styles and change management

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## Feedback after workshops

Not so much:

- Myers Briggs analysis
- Role-playing
- Length of opening workshop

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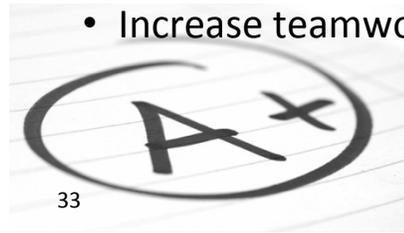


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## Anticipated Outcomes

- Advance strategic agenda by reinforcing connection between 'leadership in action' and strategic imperatives
- Adopt a common leadership profile
- Enhance leadership competency of leaders
- Increase teamwork and collaboration



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## Managing a Leadership Program with Regional Participants

- Take advantage of existing management processes and graft leadership program into existing paradigm
- Leverage technology
- Set expectations and lock-in schedules early on
- Use every opportunity to keep the program 'on the radar'

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Leaders who use LPI behaviors are frequently are seen as:

- More effective in meeting job-related demands
- More successful in managing up to clients
- Creating higher-performing teams

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- Fostering loyalty and commitment
- Increasing motivational levels and willingness to work
- Possessing high degrees of personal credibility

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## Questions & Comments



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