

WEBINAR

Building a Collaborative Culture for Greater Client Growth

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Clinton Gary
CREDO Consulting

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Clinton Gary, President, CREDO

A collaborative growth consultant to law firms

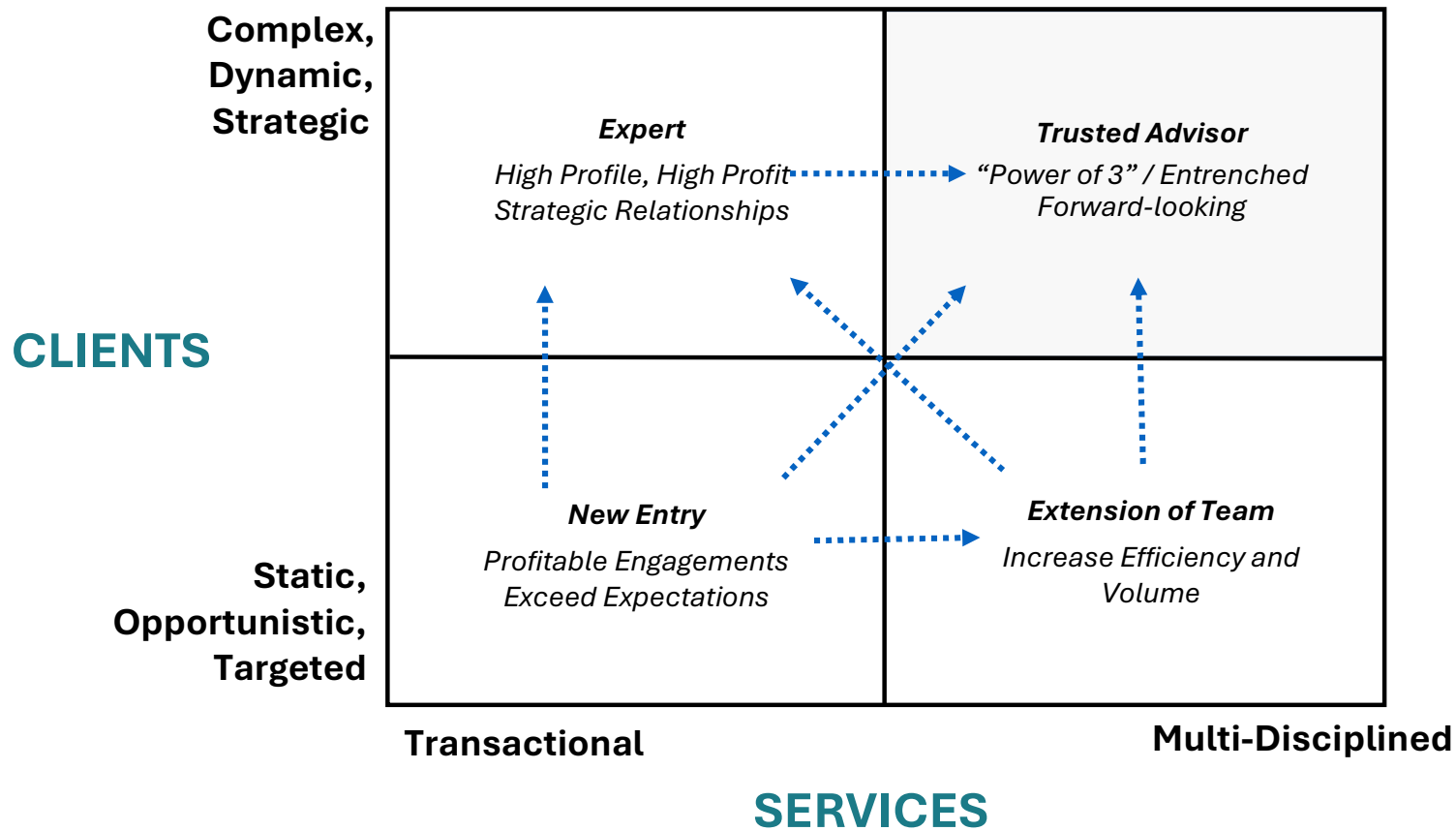
Services

- Collaborative **Firm**
- Collaborative **Practice Team**
- Collaborative **Lawyer**



Contact

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Source: How the World's Most Admired Companies are Shaping Culture to Achieve Business Goals and Competitive Advantage, Korn Ferry 2023

Indications of Collaboration Challenges in Law Firms

Client Expansion



Industry Teams



Knowledge Management



Self Assessment



Indications of Collaboration Challenges

- Siloed office or practices
- Resistance to shared goals
- The lack of knowledge sharing
- Lack of cross-practice content
- Lack of cross-selling
- Lack of dynamic staffing
- Lack of team engagement
- Culture “not what it used to be”
- Disgruntled Partners



Slow or siloed growth
Uneven reputation
Few / No institutional clients
High turnover

“I need $1 + 1 + 1 = 5$ ”

Managing Partner

Collaborative Culture Mutually Reinforcing Layers

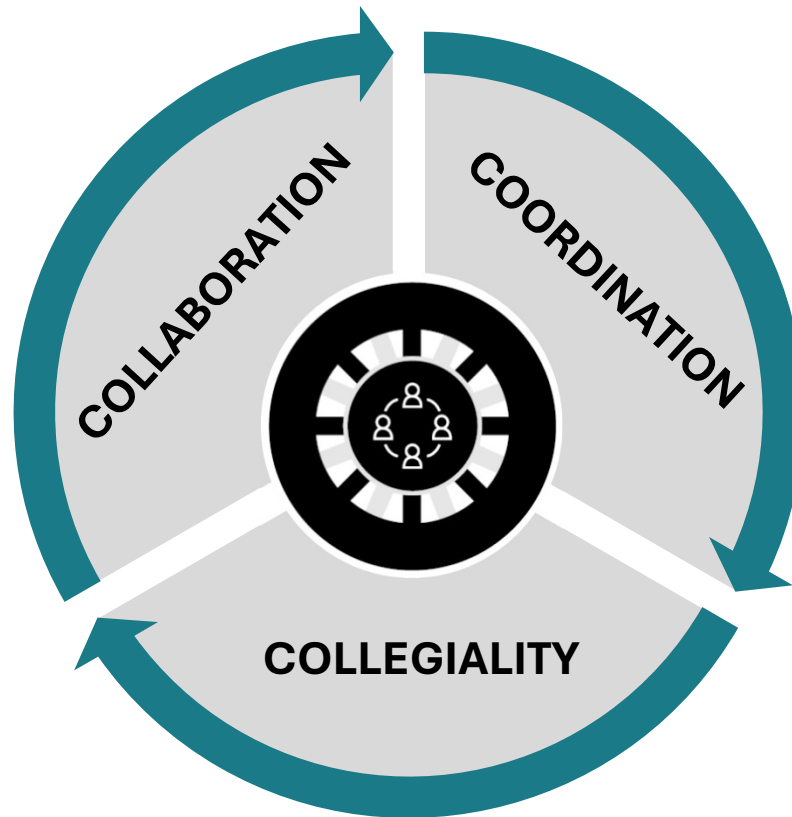
Bringing people together to solve a problem and learn something new.

Diverse talent

Couldn't do it alone

Mutually beneficial

Trust



Orderly arrangement of group efforts

Sharing a common view

Synchronized

Awareness

Cooperative relationships with colleagues

Effort

Knowledge sharing

Fairness

Collaboration Assessment - Firm or Team

Phases	Drivers
<p>1 Coordination</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>2 Collegiality</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>3 Collaboration</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

For a copy of the CREDO Collaborative Business Development Firm Assessment, contact the speaker, Clinton Gary, at clinton@credocg.com

Collaboration Assessment - Lawyer

- Lack of time or inefficiency of collaboration
- Lack of knowledge of firm's capabilities and expertise
- Lack of competence trust ←
- Lack of interpersonal trust
- Poor incentives and KPIs (includes comp)
- Lack of collaboration skills and confidence
- Less-than-collaborative leadership
- Organizational design

6 Key Attributes of Highly Collaborative Firms

1

Mutually supporting initiatives



2

Standardize key collaboration processes



3

Emphasize consistency across teams



4

Manage knowledge as equally as finances



5

Strategically link talent to opportunity



6

Client Champion is Super Collaborator





Case Studies

Case Study 1 - Improve Practice Team Effectiveness

Catalyst: Change of leadership.

Assessment: Ineffective practice teams.

Initiatives:

- Conducted retreat to define partner expectations
- Established new practice team structure
- Established annual partner plan development process; Plans “rolled-up” for PT plan
- Improved practice teams – leadership training, meetings, and import / export reports
- Developed a PG-oriented key client program

Results:

- Leaders wanting to be practice leaders; Seamless transition to new MP
- Consistent and aligned practice plans and individual plans
- Higher team engagement

Case Study 2 - Maximize Knowledge Sharing

Catalyst: Struggle with cross-practice collaboration. Unable to expand on industry best practices.

Assessment: Poor use of relationships and knowledge. Attorneys didn't know how/when to collaborate.

Initiatives:

- Implemented Enterprise Relationship Management technology
- Code clients by industry
- Launched Industry Initiative; Attorney driven
- Attorney growth plan coaching

Results:

- 400% increase in known relationships; avg 300 visits per month
- Better email lists supporting better content openings and event attendance
- All attorneys with an industry orientation in individual plans; Consistent industry team plans
- Greater growth from industry teams than practice teams

Case Study 3 - Identifying Client Collaboration Opportunities

Catalyst: Slow growth. Good clients but no institutional clients.

Assessment: Disgruntled due to lack of sharing.

Initiatives:

- Conducted retreat presentation which included money “being left on the table” from lack of collaboration
- Performed a “white space report” to identify specific collaboration opportunities
- Provided individual coaching for collaboration opportunities in client pursuits
- Coached for broad relationship collaboration for business development, including referral partners

Results:

- 20+ new opportunities
- Firm recently acquired by international firm; for its collaboration and sophistication

Case Study 4 - Building Trusting Relationships

Catalyst: Significant laterals. Culture not as collaborative as it used to be.


Assessment: Trust issues

Initiatives:

- Established "monthly lunch pairings"
- Incorporated new attorney introductions at retreats and anniversaries
- Co-content development projects

Results:

- Continued lateral growth; Increase in quality
- Above average Associate rankings for culture
- New cross-practice content achieves record downloads three years in a row
- Accelerated strategy execution



For a Collaborative Business Development Assessment
of your firm or practice team,
contact Clinton Gary at clinton@credocg.com

CREDO Services

Strategic Growth Consulting

(focus, alignment, accountability)

- Speaking and Workshops – Accelerating Collaborative Growth
 - Growth Strategy Development (Firm or M&BD Dept)
 - Collaborative BD Firm or Practice Team Assessment
-

Operational Excellence

(programs, processes, knowledge)

- BD and Marketing Department Assessment
 - Firmwide Marketing Planning and Budgeting
 - Industry and Key Client Programs
 - Practice Group Growth Management
 - BD Knowledge Management / Experience Management
-

BD Professional Development

(intentionality, execution, sustainability)

- Business Development Training and Coaching
- Smarter Collaboration Accelerator™ Team and Individual Strengths Assessment



Clinton Gary

Clinton is the founder of CREDO – a consulting firm dedicated to creating more collaborative growth in law firms.

Clinton presents and facilitates workshops at retreats championing the benefits of collaborative business development to maximize a firm’s collective capabilities for greater growth.

His consulting services – with midsize firms both national and international – have included growth assessments, as well as the areas of:

- practice team effectiveness,
- industry and key client programs,
- knowledge management initiatives,
- marketing planning and budgeting, and
- business development training.

Prior to consulting, Clinton served as a marketing leader for Arthur Andersen, the largest global accounting and consulting firm, and Chief Marketing and Business Development Officer at regional, national, and global law firms, where his firms were recognized for “Best Law Firm Marketing” and the “Mid-size Hot List” for best law firm growth strategy.

