Breakout #2:
Enhancing Client Team Strategy and Culture: Following in the Big 4 Footsteps

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Improving Your Client Teams

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Most have or plan to have client teams. Lack of accountability is a challenge to those with client teams.

**Firm has client focused teams?**
- Yes: 44%
- No, but plan to implement: 24%
- No, don't plan to implement: 32%

**Biggest impediments to client team success**
- Lack of accountability: 81%
- Lack of leadership: 42%
- Lack of effective metrics: 35%
- Lack of training: 19%
Improvement Opportunities

Opportunity #1: Accountability
Accountability

• I) Observations:

Keys to success:
1. Commitment of firm leadership.
2. Clear communication of objectives.
3. Measurement and reward

A) Clear set of objectives - What does success look like?
B) Client team business plans - Planning for and committing to success
C) Client Team members - Objectives and measurement of success
Accountability

• II) Possible solutions:

• Ensure the objectives and expectations of the overall “Key Client” program are clear and understood

• Ensure client team members clearly understand their roles and team expectations (objective and subjective measures)

• Develop clear annual client team business plans – revenue/relationship building/cross selling/etc) and the lead client partner’s role in delivering the plan

• Measure and reward “success”
Improvement Opportunities

Opportunity #2:
Leadership
Leadership

I) Observations:
A) Multiple models and priorities exist
B) Leadership experience
C) Why change?
D) Single process and consistent direction?
E) Consistent reinforcement and rewards?
Leadership

II) Possible solutions:

• Creating immediate universal change
• Creating more gradual improvements
• "Skunk Works"
Improvement Opportunities

Opportunity #3: Metrics
Metrics

II) Observations:

“Success” in team leadership is often not clearly defined or understood by team leaders, thus tough to measure

Traditional professional services firms partner remuneration structure is predominantly revenue linked - needs to reinforce expected client program related behaviors and firm expectations

Some partners are better than others at client team leadership

Firm management structures can be rigid/ inflexible
Metrics

II) Possible solutions:

Look at alternative remuneration structures. Part of client team lead partner’s overall remuneration linked to “success”

Team leadership metrics:

- Make sure communication of the objectives and expectations of “Key Client” partners are clear and understood
- Set clear annual client team lead partner objectives
  – revenue/ relationship building/ cross selling/ etc.
- Clearly define what “success” means. Measure and reward
Improvement Opportunities

Opportunity #4:

Training
Training

• 1) Observations:

A) Establish Expectations
B) Define Roles and Responsibilities
C) Provide Tools for Accountability
D) Create a Consistent Process
Training

II) Possible solutions:

• Identify a motivated leader – involve in the training
• Get outside help
• Focus on improving the client’s business—a new paradigm
• Create and maintain a plan for keeping the process moving forward
Improvement Opportunities

*Other opportunities??*

Other observations or experiences?
Future Questions

• What are some good benchmarks or observed best practices at law firms relative to effective client teams?

• Are there some achievable metrics of success? And how/when should they be measured? For example, how can a team be measured as being say "70% effective"? And should they be goaled to improve say 5% each year? And how?

• Is there a way to correlate team effectiveness with the financial metrics of engagements, which many firms use today? (net engagement revenue, total hours, utilization, net profitability, total contribution, and others)
Thank You

• Other Questions/Discussion
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