



## ENGAGING LEADERS PROGRAM

The opportunity to drive growth in revenue and profitability has never been more vibrant – and important – than in today’s competitive marketplace. Many law firms are taking a fresh look at how to enhance and expand client relationships, evolve operational models and attract and retain top talent to ensure long-term success. The Tilt Institute’s *Engaging Leaders Program* educates, engages and empowers current and future leaders to drive lasting change across their organizations.

Our programs are tailored to help our clients accomplish a mission-critical objective. The MBA-style format encourages independent exploration of ideas and engenders collaboration. We instruct, challenge and build consensus among current lawyer leaders, administrative leaders and incoming leaders to deliver specific, actionable recommendations to drive the future of the Firm. Our programs emphasize:

- Critical thinking and analysis of the business of law
- Data-driven go-to-market planning and strategy development
- Cultural influences and deterrents to change
- Collaborative engagement techniques
- Change management principles
- Ways to establish and maintain accountability

**Whether to devise a strategic vision, double revenue in under five years or redefine business development, each *Engaging Leaders Program* has lofty goals and a profound and lasting impact.**

We approach this program in three phases:

- I. One to Two-Day Intensive – immersive program to baseline knowledge and establish objectives
- II. Task Force Bootcamps – deep dives into core opportunities/challenges for the Firm
- III. Recommendations to the Partnership – a unified presentation to the Firm

We work with clients to jointly hone and refine this proposed agenda over the course of our work together. Below is a starting point for consideration and discussion.

### I. TWO-DAY INTENSIVE TO KICK-OFF THE ENGAGING LEADERS PROGRAM

We work with clients to kick off the *Engaging Leaders Program* with an intensive one to two-day deep-dive into the fundamentals of the business of law, trends in the legal industry and the Firm’s current position, strategy and available resources. This initial meeting will serve to create a baseline understanding of the Firm and its opportunities and challenges in the context of the broader market. Attendees will be encouraged to interact with one another and instructors to probe into issues such as increasing revenue in a flat market, changing client demands, new pricing models, market disruption, alternative staffing models, the rise of innovation, how to measure and grow firm profitability, and more.

Over the course of the two days we will combine instructor-led programming with interactive discussion. We will team up with your Firm’s executive leaders to present key facets of the Firm and how each relates to the big picture objective of strategic growth. An example of a two-day agenda appears on the following pages.

## SAMPLE AGENDA FOR ENGAGING LEADERS

### *Day One*

8:30 a.m. Introduction and Vision for the Engaging Leaders Program (Managing Partner)

9:00 a.m. The State of the Legal Industry: Leading Through Market Disruption (Tilt)  
An overview of the legal market including an analysis of growth trends in the AmLaw 200, key market drivers, overarching industry trends and the impact on law firms.

9:40 a.m. Business of Law Fundamentals (Firm or Tilt)  
A presentation by COO/CFO to introduce the group to the basics of law firm finances, the Firm's specific performance and how this performance stacks up to competitors and market expectations.

10:30 a.m. BREAK

10:45 a.m. The Firm's Client Relationships and Business Development (Firm or Tilt)  
A look at the Firm's existing clients, their changing needs and expectations and how the firm is competing effectively for new work.

11:30 a.m. Talent, Diversity and Inclusion (Firm)  
The Firm's Chief Talent Officer will present a vision of the future through the lens of talent acquisition and retention, sharing her experiences and challenges both at the Firm and in the industry at large.

12:15 p.m. LUNCH

1:00 p.m. Technology (Firm)  
A detailed update on the firm's recent and forthcoming investments in technology and where the industry is headed.

1:45 p.m. The Firm's Current State of Affairs (Tilt)  
Objective, candid assessment of the firm's position in the market, key opportunities and challenges based on the firm assessment work we did together in preparation for the retreat.

3:15 p.m. BREAK

3:30 p.m. The Law Firm of the Future – *Re-Imagining Law Part I* (Tilt)  
A compacted version of the *Re-Imagining Law* program to highlight the holistic nature of change in the legal industry and bring attention to the interrelated facets influencing change in a law firm including Strategy/Structure, Culture, Talent, Use of Data and Innovation. Includes exercises and interactive discussion.

5:00 p.m. Closing comments and adjourn (Managing Partner)

## SAMPLE AGENDA FOR ENGAGING LEADERS (CONTINUED)

### *Day Two*

9:00 a.m. The Competitive Landscape – Trends in the AmLaw 200 (Tilt)  
Trend analysis of movement among the AmLaw 200 with an emphasis on understanding implications and meaning in key financial metrics. Identification of warning signs and triggers.

9:45 a.m. The Competitive Landscape – Case Studies (Tilt)  
An interactive exercise examining the choices and financial performance of select law firms.

10:45 a.m. BREAK

11:00 a.m. The Law Firm of the Future – *Re-Imagining Law Part II* (Tilt)  
A compacted version of the *Re-Imagining Law* program to highlight the holistic nature of change in the legal industry and bring attention to the interrelated facets influencing change in a law firm including Strategy/Structure, Culture, Talent, Use of Data and Innovation. Includes exercises and interactive discussion.

12:00 LUNCH

1:00 p.m. The Law Firm of the Future – *Re-Imagining Law Part II continued* (Tilt)

2:15 p.m. Leadership and Transformation (Tilt)  
Facilitated presentation and discussion of leading change and creating accountability.

3:00 p.m. BREAK

3:15 p.m. A Roadmap for the Engaging Leaders (Tilt)  
Session(s) designed to advance thinking, promote discussion and, ultimately, develop a road map for the remainder of the program around key objectives and areas of interest.

4:30 p.m. Closing comments and adjourn

We intersperse activities, discussion and exercises over the course of the two days to review and apply key learnings and advance the group towards the next phase of the program: task forces to deep dive on core issues. Our goal is to have this two-day program culminate in the definition of a small number of mission-critical issues to bring forward for deeper investigation, brainstorming and, ultimately, concrete recommendations.

## II. TASK FORCE BOOTCAMPS

The outcome of the initial meeting will be the designation of specific opportunities and/or challenges for further discussion and pursuit. During or after the first meeting we will divide members into task forces to work independently as small teams to tackle particular questions and issues. The objectives of each group may be slightly different; however, the overarching goal will be for each task force to return to the *Engaging Leaders* team with a set of tailored, well-researched recommendations to discuss, refine and, ultimately, present to firm leadership.

The Tilt Institute will create a structure for the task forces and serve as a resource for advice, direction and any additional research needs. We recommend hosting 3 to 5 in-person sessions over the course of this phase (typically 3 to 6 months in length) during which the *Engaging Leaders* will work together to advance their thinking and identify synergies. Between sessions, we will host periodic coaching calls and check-ins, as needed, to provide guidance, monitor progress and ensure the groups stay on track.

Though each task force assignment will be unique, we envision all will:

1. Share a singular goal as defined during the initial meeting (e.g., create strategic/structural alignment)
2. Establish clear parameters and objectives for their group
3. Perform research and incorporate external sources to deepen their understanding of their topic area
4. Build a business case for why a specific recommendation or set of recommendations is in the best interest of the Firm
5. Develop a compelling presentation to support their recommendations

The final in-person group meeting will be the forum for creating a unified front, building consensus around a single set of recommendations and devising the presentation for firm leadership. It is common at this stage for 2-3 clear leaders to emerge from the broader group who will take the reins for finalizing and presenting the results of the group's joint efforts.

## III. RECOMMENDATIONS TO THE FIRM

The leader group will present their key findings and recommendations to the firm partnership in-person during a dedicated event (or specified time at an existing event such as a partner meeting). Leadership receptivity and commitment to learn from and act upon these recommendations will set the stage for future success and engagement.

Other formats of this program have culminated in the development of change visions, go-to-market plans, action steps and implementation plans. The Tilt Institute remains active in ensuring the ultimate success of ideas, recommendations and next steps resulting from the *Engaging Leaders Program*.

## CASE STUDIES

### *Vive la Independence!*

An AmLaw Second Hundred super-regional wanted to significantly grow firm revenue, retain independence and ensure long-term success. The group evaluated various facets impacting their ability to thrive including pricing and profitability, investment of resources, encouragement of innovation, expectations and goals for practice group leaders, corporate governance and compensation. The year-long program culminated in the replacement of 9 of 13 practice leaders, reallocation of more than half the firm's business development dollars, the initiation of a strategy development process.

### *Let's Regroup – Industry Alignment*

A high-end regional firm determined their best path to growth entailed a transition from practice to industry structure. After laying the groundwork, gathering input from the lawyers and designating a group of lawyers to lead each of 6 industries, they sought guidance in taking the next step. Over the course of a year, the group advanced along three parallel tracks – a series of steps to propel transformation and ignite enthusiasm for change, an overarching framework to guide the transition and development of individual go-to-market plans for each of the industry sectors. The firm most recently incorporated industry-specific goals into their compensation reviews, hired a full-time manager to support implementation and began to advertise lateral opportunities by sector rather than practice.

### *Selling for the Future*

A 350-lawyer firm in the South sought to stay ahead of changing client needs and dynamic shifts in their markets – some of the fastest growth areas in the U.S. – while simultaneously galvanizing their next generation of leaders to take the helm. Over the course of six onsite sessions, four unique task forces devised specific recommendations for how to transform the way the firm approached clients, business development and hiring to ensure future success. The firm designated a new C-level role to aid in partner transition, added soft skills to their hiring process, rolled out one-on-one coaching and continues to invest in leadership and professional development with noteworthy payoff in climbing PPEP.