

# The Expanding Role of Professional Development: Preparing Lawyers for Business

*Survey of law firm professional development 2020*

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Creating Competitive Advantage

# About this study

In mid-2019, Marcie Borgal Shunk of The Tilt Institute and Silvia Coulter of LawVision Group were discussing their respective experience educating lawyers in leadership, business development and client relationships. Over the past several years, they noted, professional development roles at law firms had become more common and, notably, more involved in shaping not just the advancement of lawyers' legal skills but also their progression into rainmakers, practice group leaders, and well-rounded contributors to their firms.

This conversation sparked an interest in understanding where law firms were on their path to creating the elusive T-shaped lawyer: how were firms delivering sales and client development training, who was responsible for giving future leaders the tools they needed to take the reins, and how well-prepared were partners for the future ahead?

The results of this study, based on surveys with more than 60 professional development leaders at the world's largest law firms, provide these answers, and more. The study reveals how far law firms have come in offering resources and support to develop business and win over clients, and the work yet to do to elevate key account programs. It exposes the nascency of law firm efforts to shape leaders who can effectively shepherd multi-million or billion dollar businesses into the future (especially now, though we could not have known at the time of our launch how important this preparation would be). Finally, it offers hope for the future: insights, ideas, and best practices to help transform the legal world for the better.

# Our thank you

Thank you to the more than 75 professional development leaders and influencers who offered input into the design and development of this study, responded to our online survey, and helped us analyze and present the data in the most effective way possible. We offered anonymity to all who responded in exchange for their candid feedback and insights. We will continue to respect this confidentiality.

A special note of appreciation goes to:

- Adam Stock, Board Member, Legal Sales and Service Organization (LSSO), a brilliant storyteller and presenter whose expert presentation and design skills helped the data sing
- The board of the Professional Development Consortium who offered their time and input into the initial design of the questionnaire and helped us get it right, the first time

We welcome you to reach out to either of us directly with any input, thoughts or questions on the research.

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# Our methodology and approach

- 65 professional development leaders responded
  - Of more than 200 invited to participate in an online survey
- Large and mid-sized law firms
  - 40% AmLaw 100
- Conducted between July and November 2019
- Focused on lawyer development in
  - Business development
  - Leadership

# Key Findings

# Key findings – overview

- The largest firms have **2 to 3 times more FTEs** in professional development than their mid-sized counterparts
  - 7.2 FTEs at AmLaw 100; 2.8 at AmLaw 101-200
- **Professional development is driving lawyer education** in leadership and business development, though not alone
  - BD professionals are highly involved in or spearheading Sales/BD training at 9 out of 10 firms
- Dedicated professional development **hours vary widely** across firms
  - Some deliver as much as 100 hours annually at every level
  - Others offering just 2 to 4 hours

# Key findings – personal assessments

- **Just 1 in 2 firms offer personal assessments to lawyers**
  - Personal assessments are common in many organizations as the foundation for
    - Increased collaboration
    - Improved diversity engagement
    - Greater self-awareness (and, therefore, stronger BD and leadership skills)
    - Leadership development
- **Law firm business professionals not getting equal treatment**
  - Just 12.6 hours annually, on average
  - 1 in 4 firms offer personal assessments to professional staff

# Key findings – BD and key client programs

- **Most firms offer Sales/BD** training to lawyers
  - 86% to partners and 93% to associates
- Sales/BD coaching **more prevalent among partners**
  - 88% of firms offer to partners, 52% to associates
- Client programs, on whole, are not living up to expectations
  - **Client teams fare worst**
    - Just 7% fully agree their “client team programs are wildly successful”
    - Only 14% fully agree their “client team program is highly effective”



# Key findings – leadership development

- **2/3 of firms offer leadership development to lawyers**
  - The majority of these kick-off with senior associates
- **Little dedicated leadership training**
  - Just 32% of partners and 15% of associates receive dedicated leadership courses
    - Most leadership is offered as part of a broader program

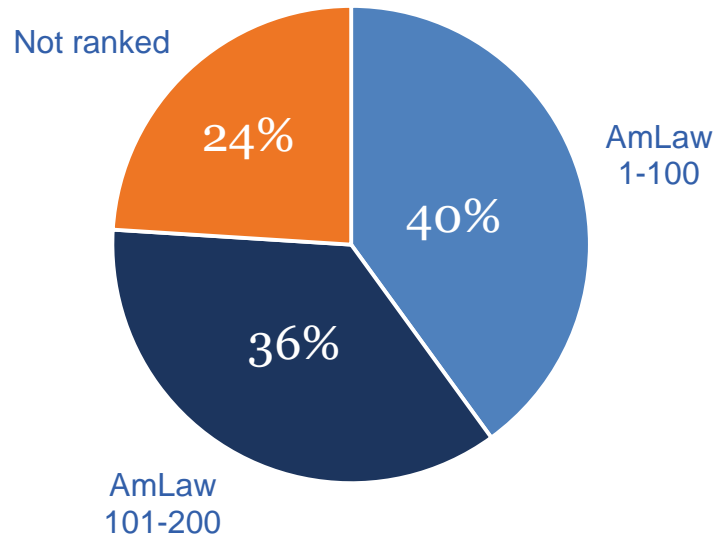
# Key findings – lawyer leaders

- Current **leadership development programs ineffective**: professional development heads rate them 4 on a scale of 1 to 10
- Lawyer leaders *most prepared* in Financials, Sales/BD and Operations/Talent
  - Lawyer leaders ***least prepared*** in **Change Management**, People Skills, Data-Savvy and EQ
- **Buy-in is the single greatest obstacle** to elevating leadership programs
  - Can't agree on what defines a leader
  - Don't consider leadership "teachable"
  - Question the long-term value

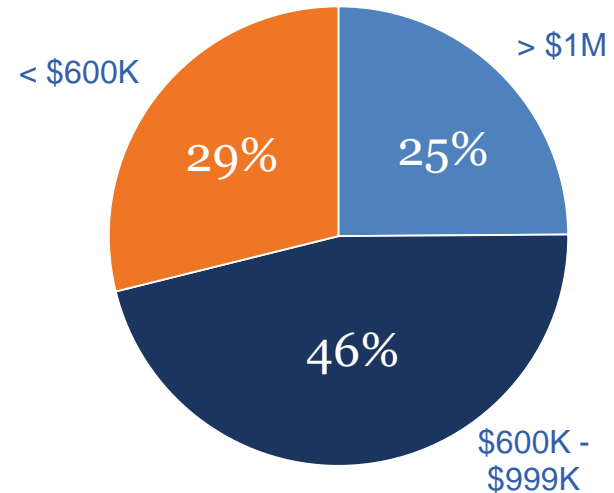
# Demographics

# Over 60 large and mid-sized firms responded

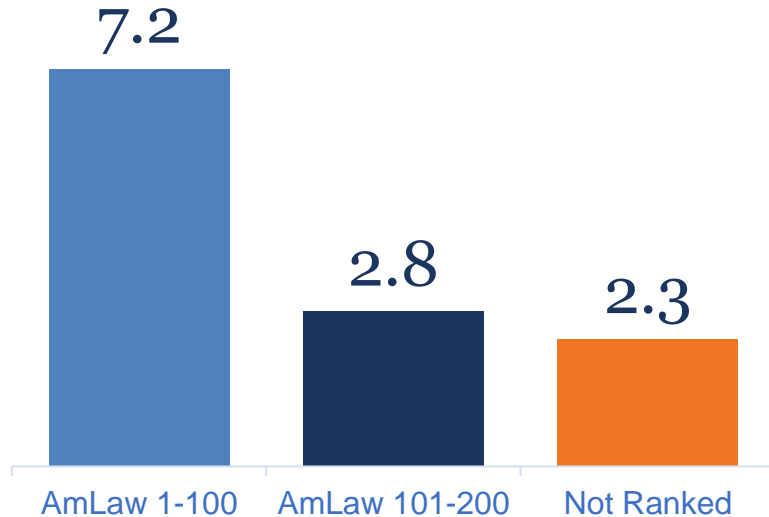
## AmLaw Rankings of Firms



## Profits per Equity Partner

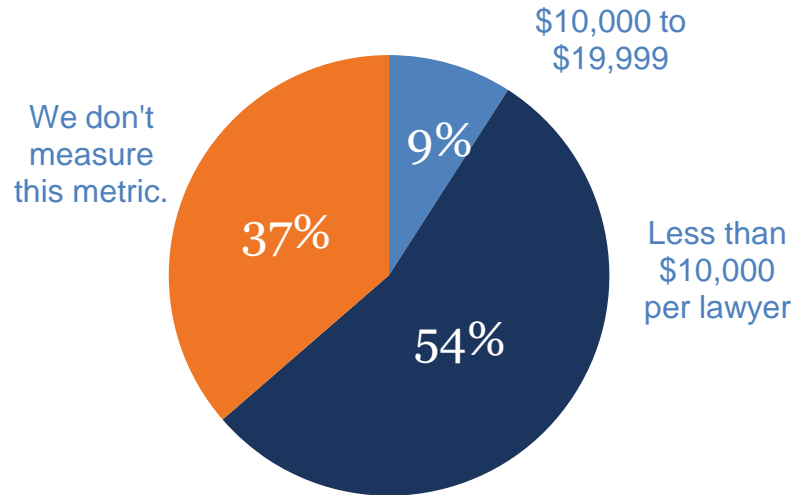


# Largest firms have over 2 times as many FTEs



*How many full-time equivalents (FTEs) are dedicated to professional development activities at your firm?*

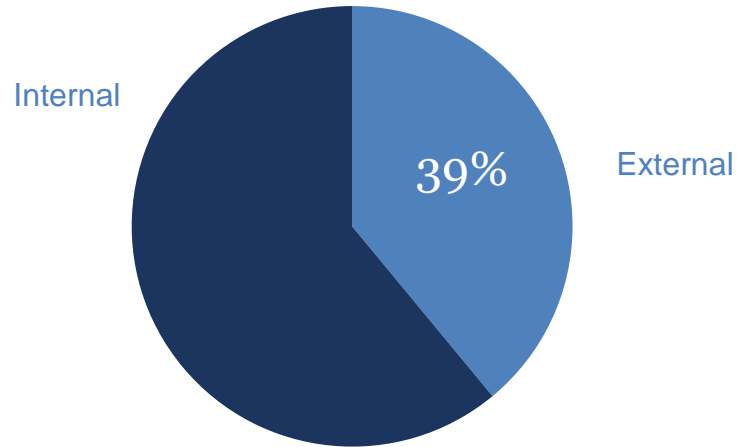
# Most firms spend less than \$10,000 per lawyer on professional development



- One-third of firms do not measure budgets on a per lawyer basis
- No firms responding spend more than \$20,000 per lawyer on professional development
- Just shy of 40% of spend goes to external providers

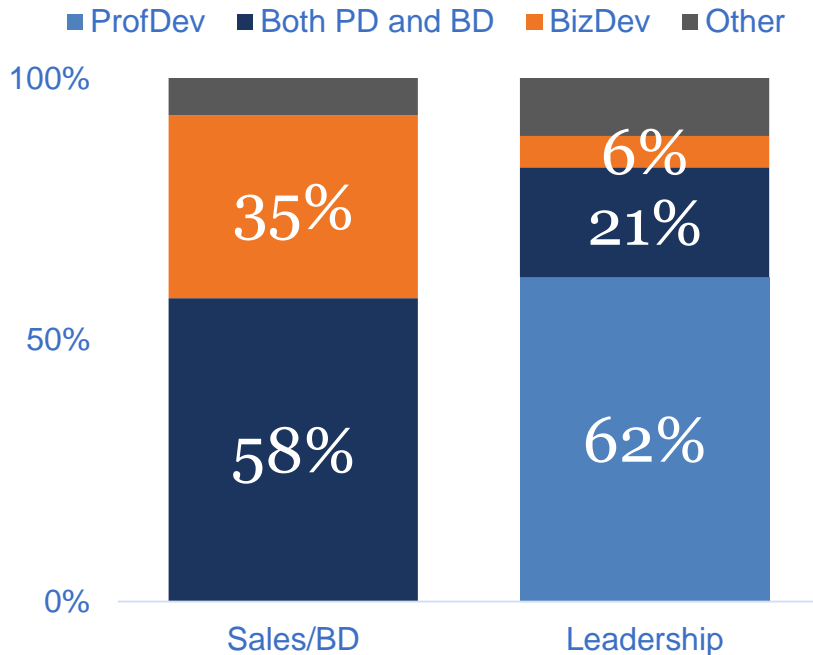
*How much do you estimate is spent on professional development, per lawyer, incl internal and external spending, excl salaries?*

# About 40% of spending goes to external providers



*About what percent of this is spent on external providers (educational programs, trainers, coaches, consultants)?*

# Professional development drives leadership training, shares responsibility for sales/BD

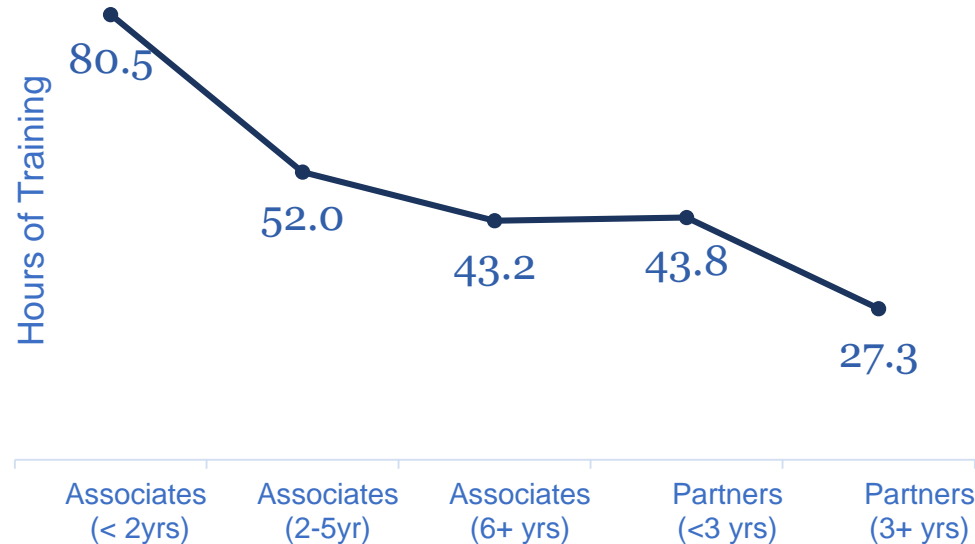


*Which groups are responsible for...sales/business development training?...leadership training?*

- 35% of firms report BD is solely responsible for lawyer sales training
- A notable 27% of firms involve BD in lawyer leadership training
- Firm management most cited as other group responsible



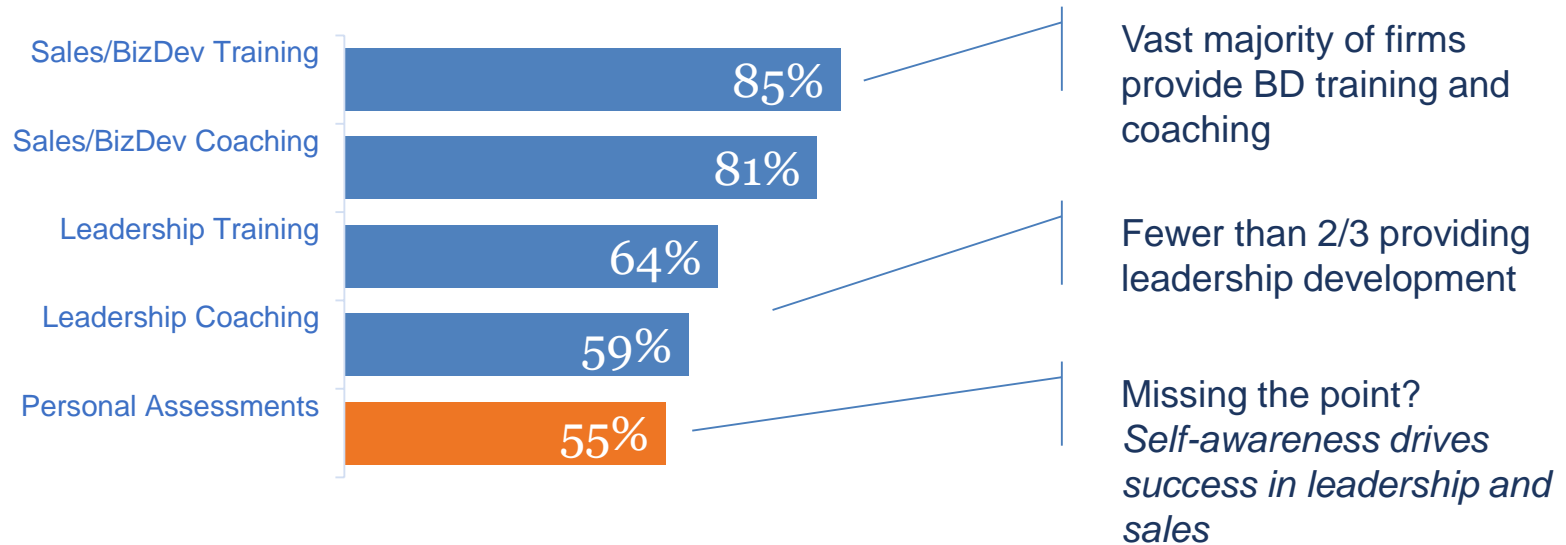
# Hours of professional development decline precipitously as career progresses



- High variability in responses
- Some firms delivering more than 100 hours at all levels
  - And up to 500 for first- and second-year associates

*About how many hours, annually, of formal professional development training opportunities are offered at each of the following levels?*

# More law firms investing in sales/BD training than leadership development



*What types of training, coaching and assessments do you offer at your firm?*

# Many *lawyers* accessing training, partners enjoying benefits of coaching more often

	Sales/BizDev training	Leadership training	Sales/BizDev coaching	Leadership coaching	Personal assessments
To all professionals	4%	0%	4%	5%	25%
To partners	86%	65%	88%	58%	50%
To associates	93%	61%	52%	26%	56%
Only to incoming leaders	0%	17%	4%	32%	0%

*The lone bright spot for professionals?*

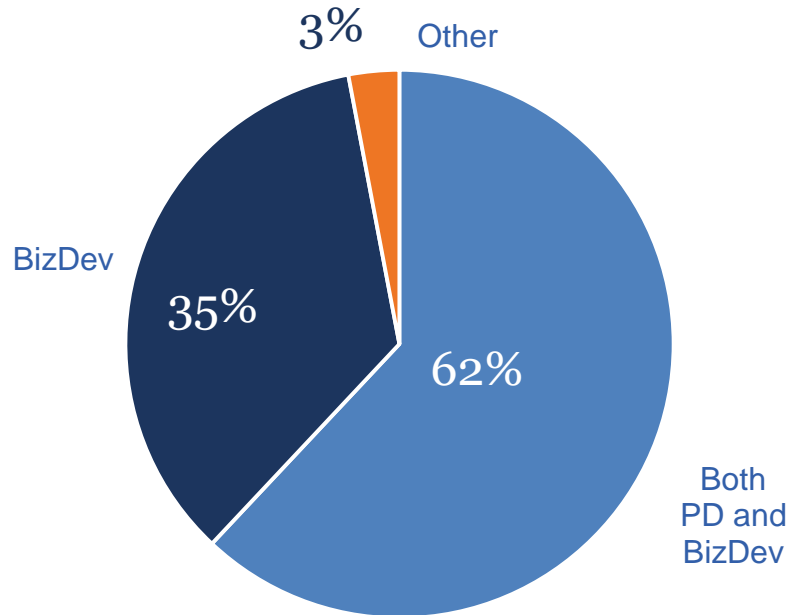
Self-awareness tools not just for lawyers at some firms.

Leadership development limited to incoming leaders at nearly 1/3 of firms

*Which of the following professional development opportunities does your firm offer formally?  
\*includes only those firms with the offering*

# Sales and Business Development Training

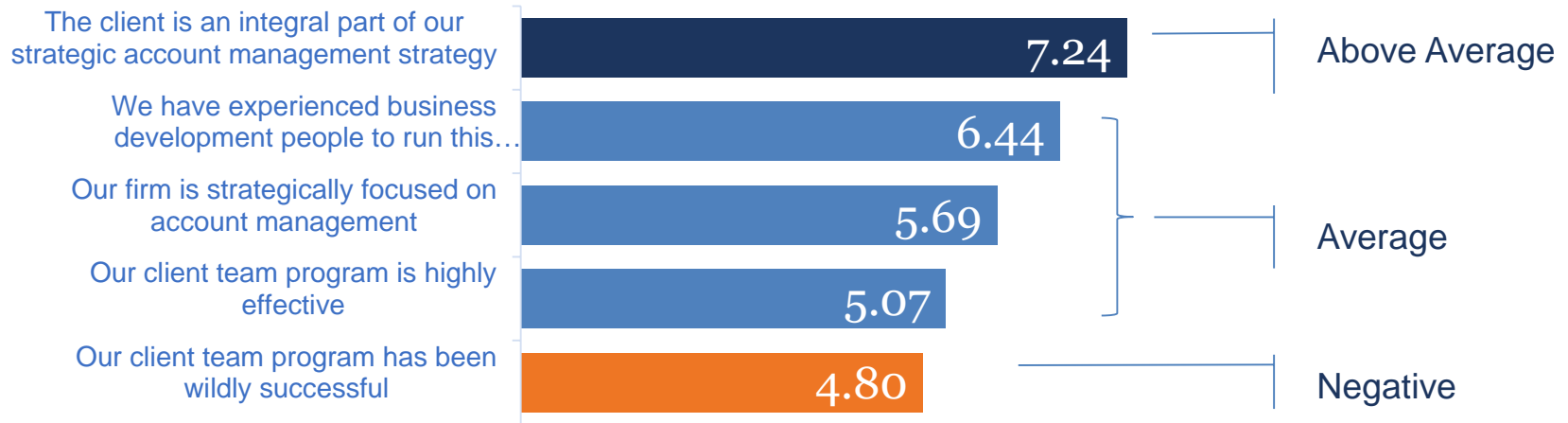
# In most firms, the Professional Development group shares sales/business development training with the BizDev group



- Professional development most likely to be involved in sales coaching for associates
- Least engaged in managing business development activities

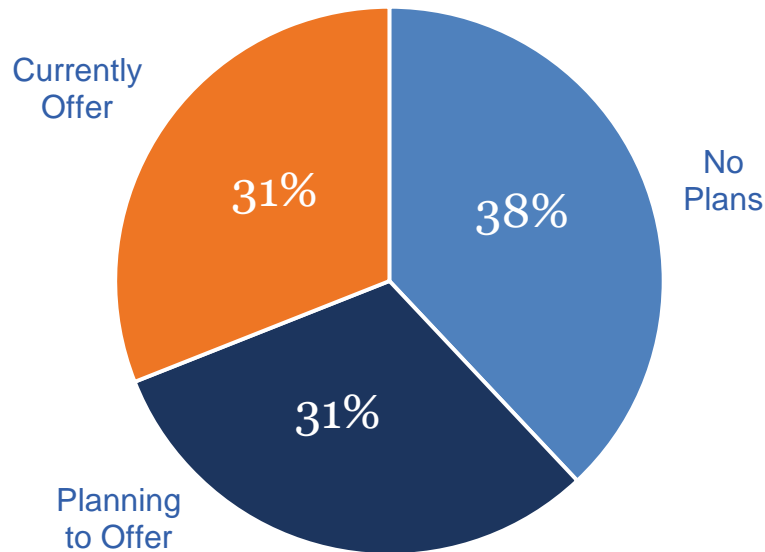
*The primary areas of business development and client team training professional development is involved in are (check all that apply)*

# Client team programs: Client programs get mixed reviews



On a scale of 1-10, how well do you agree with each of these statements?  
\*only asked of PD professionals involved in sales/BD training

# Fewer than 1 in 3 firms currently train leaders to develop and manage revenue goals



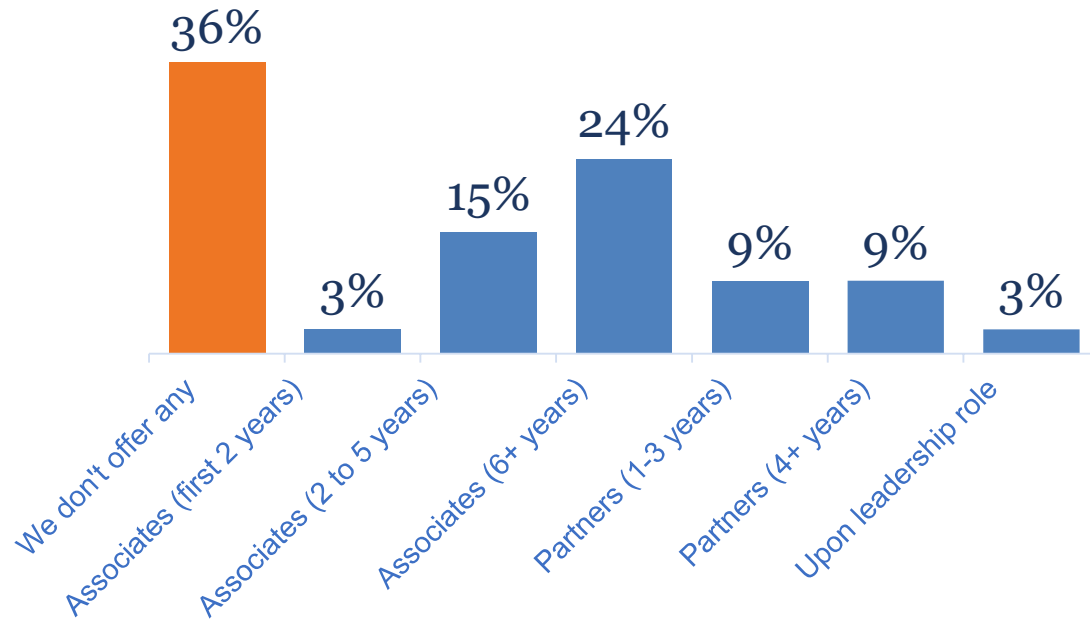
- Another third planning to offer
- Still, a remarkable 40% have no plans to equip leaders with tools to drive revenue growth

*Do you offer or plan to offer training to your leaders to develop and manage revenue goals?*

# Leadership Training



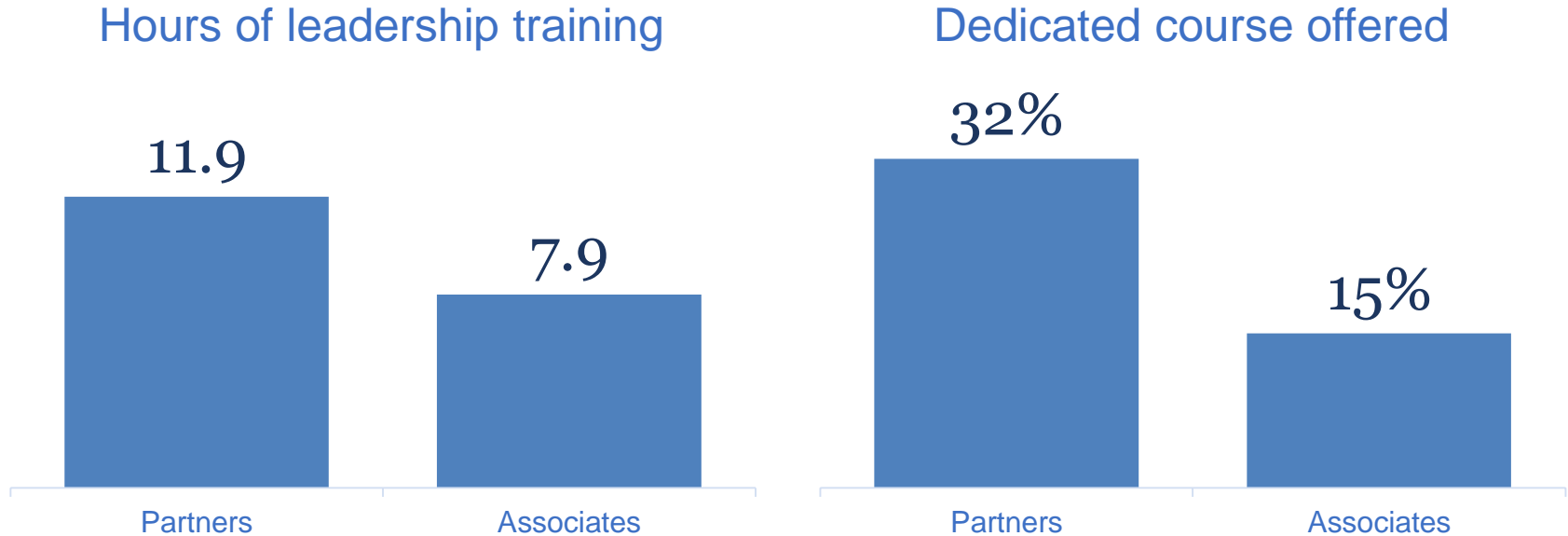
# Leadership training typically starts mid-career, for those who receive it at all



*In what year does the firm begin offering leadership training to lawyers?*

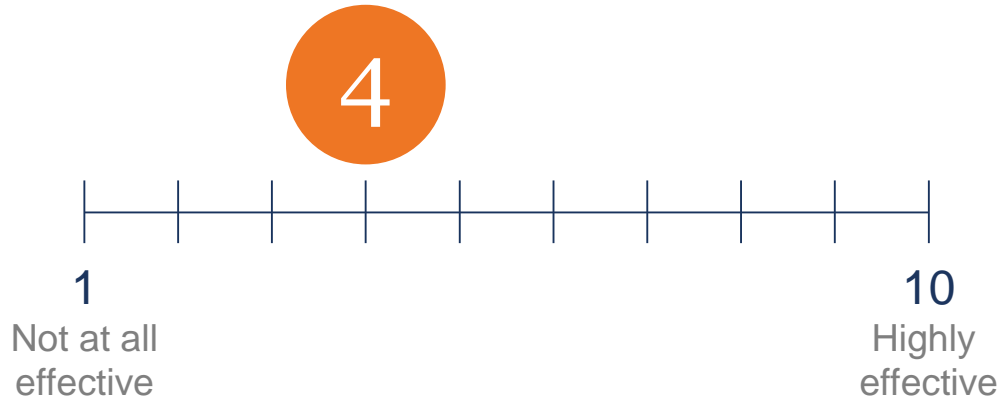
- Just 2 in 3 firms provide leadership training to lawyers
- The majority start early, with 40% kicking off leadership skills development with associates

# Moderate hours of leadership, most often combined into broader programs



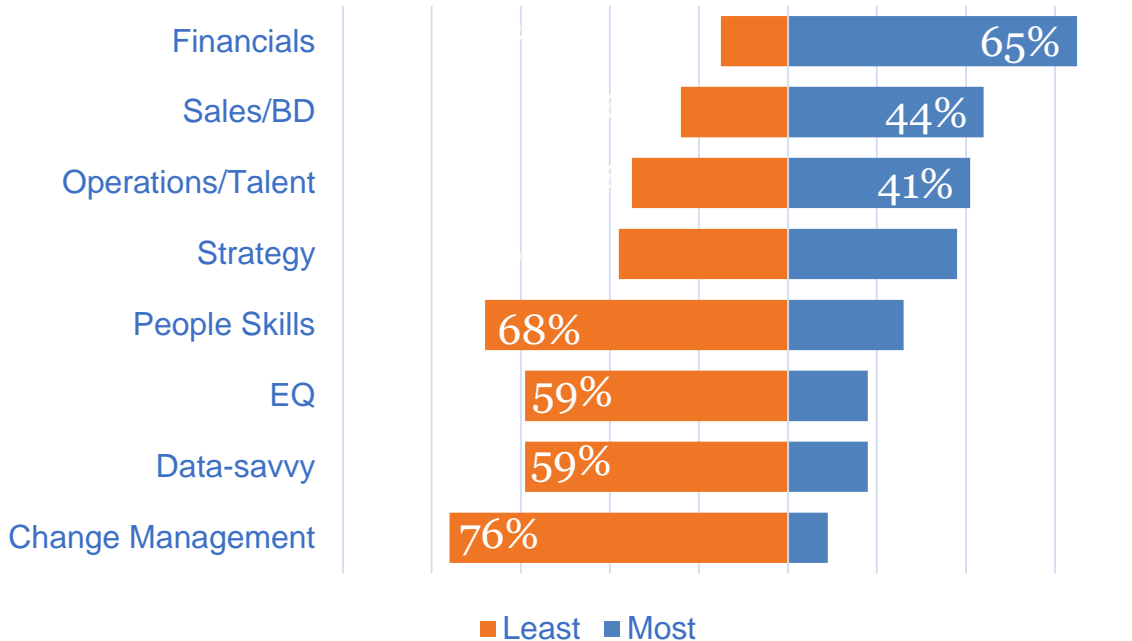
*About how many hours of formal leadership training and/or assessments do you estimate partners (associates) receive annually?  
Is leadership training for partners (associates) offered as a dedicated course or as part of a broader program?*

# Law firms believe that their leadership programs are not that effective



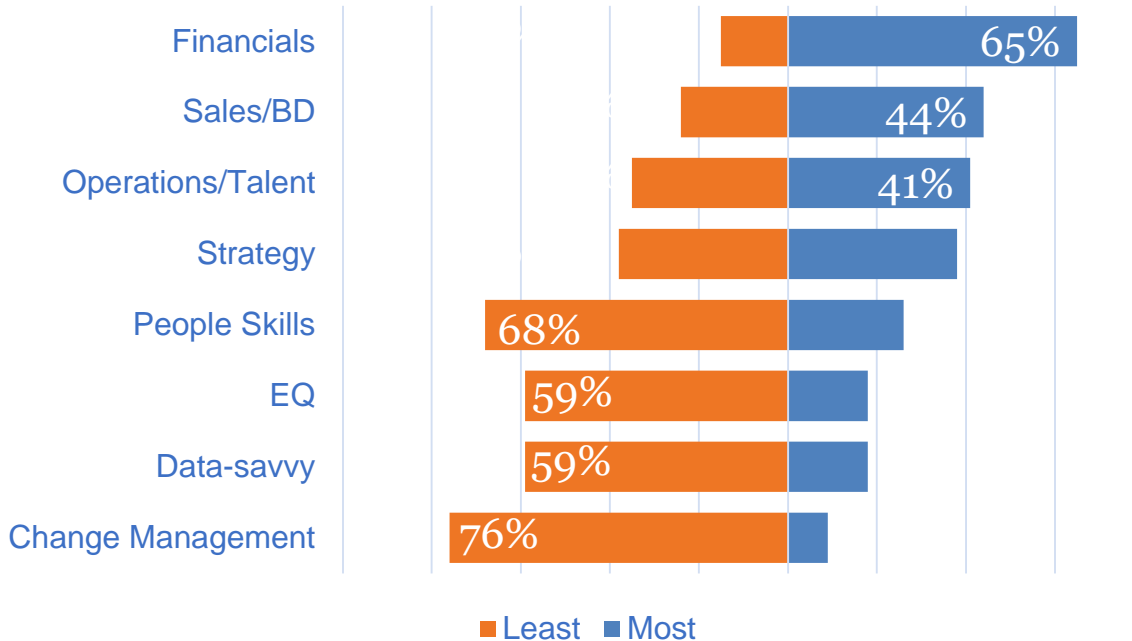
*How effective do you believe your current leadership development programs are at creating the most well-prepared leaders to guide the firm into the future?*

# Lawyer leaders most prepared in financials, sales and operational management



*In which of the following areas do you believe incoming lawyer leaders are MOST (LEAST) prepared when they enter a leadership role?*

# Lawyer leaders least prepared in change management, people skills, data-savvy, and EQ

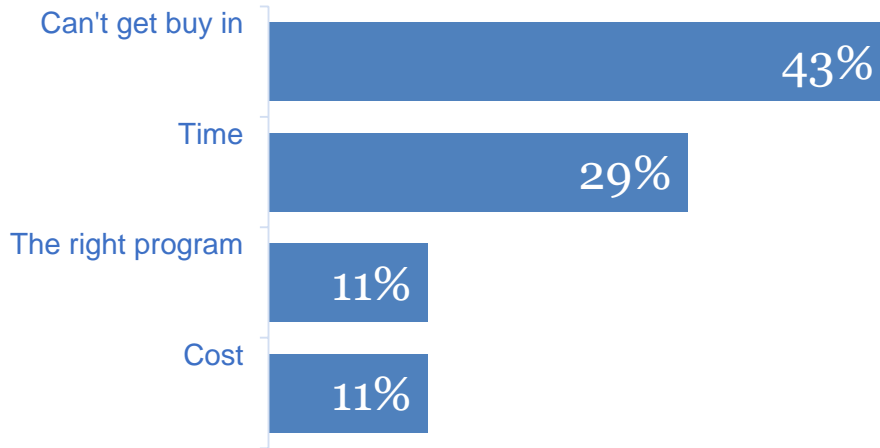


*In which of the following areas do you believe incoming lawyer leaders are MOST (LEAST) prepared when they enter a leadership role?*

## 3 reasons why leadership training is faltering

1. An erroneous belief leadership is inherent and leadership skills can not be trained or taught
2. Lack of management or leadership support for investing in such a program
3. Failure to see the benefit of such a program for the firm and its overall performance, yet leadership excellence directly ties to profitability

# Lack of “buy in” is the biggest obstacle to effective leadership programs



*What is the single greatest obstacle to creating the leadership program you think would optimize and best prepare future leaders at the firm?*

In their words: Lack of perceived value and buy-in are the biggest obstacles to developing an effective leadership program

Current management having the foresight to see the value of a leadership program

Identifying who may qualify for such a program

Buy-in and how it benefits the firm

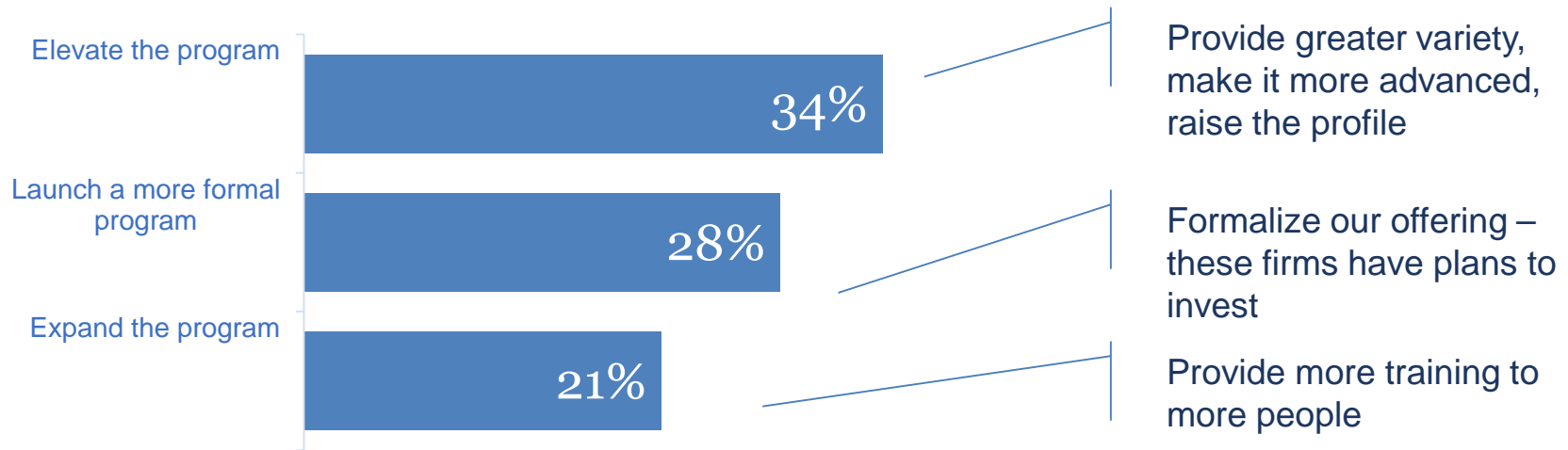
Full buy-in that leadership training is necessary, that leadership can be taught, and it can be learned

Lack of resources / management support

*What is the single greatest obstacle to creating the [ideal] leadership program?*



# PD leaders want to elevate, formalize and expand leadership development offerings



*If you could change just one thing about your leadership program to get it closer to a 10, what would it be?*

# PD leader ideas for improving leadership training

- Offer a Mini-MBA Course
- Incorporate current leadership trends to stay fresh and relevant
- Augment with skills to help shape the firm (mentorship, strategy)
- Increase selectivity through an application and selection process
- Create a vision to define the exemplary leader

# Recommendations

# Recommendations to elevate Sales/BD and leadership development for lawyers

1. Combine training and coaching to have a greater impact
2. Adopt best practices to improve performance of client team programs and client development activities
3. Engage in activities to generate buy-in for leadership development
4. Demonstrate the impact of professional development with clearly defined metrics including:
  - Organizational effectiveness and/or culture assessments
  - Leadership assessments or 360 reviews
  - Deploying pilot programs for select groups

# Combine training and coaching for greater impact: *To train or to coach?*

	Training	Coaching
Ideal group size	24 (ideal for highly interactive) to several hundred (more lecture style)	Small groups, cohorts (e.g., senior associates, non-equity partners), select individuals (who to invest in? e.g. emerging rainmakers, incoming leaders)
Level in career	Any	BD: Mid- to senior on-track associates; early to senior partners; laterals Leadership: mid- to late-career; emerging leaders
Benefits	<ul style="list-style-type: none"> <li>• Baseline understanding</li> <li>• Establish common language, tools, processes</li> <li>• Cost-effective and efficient</li> <li>• Builds teams and collaboration</li> <li>• Facilitates behavioral change</li> </ul>	<ul style="list-style-type: none"> <li>• One-on-one</li> <li>• Personalized attention tailored to individual needs and styles</li> <li>• Often incorporates self-awareness</li> <li>• Facilitates collaborative approach</li> </ul>
Drawbacks	<ul style="list-style-type: none"> <li>• Less individualized to each learner</li> </ul>	<ul style="list-style-type: none"> <li>• Requires additional budget</li> <li>• Demands dedication of individuals</li> </ul>

# Adopt client team program best practices

- Client selection
  - Top clients by fees collected
  - Clients with identified growth opportunities
  - At-risk clients (e.g., declining fees, net effective rate or realization)
  - Clients planning for succession
  - Clients in potential growth markets, marquee clients
- Client involvement
  - Client attends client team meeting 1-2 times per year
  - Team solicits input and feedback on client team goals
- Clients strategic objectives align with team goals
  - Team meetings are focused on strategic objectives versus day-to-day activities

# Adopt client team program best practices *(continued)*

- Number of teams
  - 2 to 4 at launch; expand up to 4-5 per year
  - Maximum dependent on firm size, client base and partner engagement
- Team leader selection
  - Initially, team-oriented and client-focused individuals
- Team size
  - 5 to 7 lawyers is ideal
    - Plus, professional support

# Adopt client team program best practices *(continued)*

- Team composition
  - partners from multiple practice areas
  - associates engaged with client or sector (research, current awareness)
  - Marketing/BD professional (coordination of activities, best practices)
  - Support staff (project management, minutes)
- Leadership and accountability
  - Written role description and expectations
  - Established mechanism for accountability
- Metrics
  - Clearly defined metrics and established targets
  - Regular reporting



# Generate buy-in for leadership development

- 1. Align the outcomes of training or coaching with specific objectives** (e.g., incorporate leadership into development of a go-to-market plan for each group or strategy for the firm or target area)
- 2. Establish performance metrics at the outset**  
Link to firm-specific goals (e.g., revenue growth, profitability, talent retention, client retention and growth)
- 3. Create clear expectations and written goals for the program**  
Solicit input from leaders and partners re success metrics
- 4. Solicit input from current/incoming leaders re: strengths, deficits (areas for growth), and needs**
- 5. Emphasize core areas where leaders are least prepared: change management, data-savvy, communication, and people skills**  
Consider re-branding program highlights in this context (e.g., become data-driven, learn to motivate others, excel at leading change)

# Demonstrate the impact – measure ROI

- Assess organizational culture across the firm
  - Culture directly influences employee engagement, talent and client retention, and long-term financial performance
- Engage in 360 reviews or leadership assessments for top leaders
  - Win over and get the Managing Partner or Chair to lead the way
- Create direct links between training outcomes and firm goals
  - e.g., more senior level client contacts, revenue growth, improved talent acquisition and retention, group performance
- Establish expectations and a continuity plan at the outset
  - A single day of training rarely results in long-term results

# For more information...



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