



THE NEW ELLIS GROUP

Monday Monday

Connecting the Dots with Karen Kaplowitz



*Helping you create and reinforce the habits of successful career building,
gleaned from my work as a business development strategist, trainer and coach*

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Searching for a Better Platform. When mid-career lawyers say they need “a better platform,” they usually mean that their business has leveled off or even shrunk and that they believe salvation lies in improving their access to clients through other partners. Lawyers looking for a better platform fall into two main categories, givers and takers. The givers have loyal clients to whom they believe they can sell a wider range of legal services than their own specialty. For them “a better platform” means a firm with more expertise to sell or a wider geographic base that matches their clients. For the other group, the takers who want more access to firm clients, their current firms either don’t have clients who need their services or their partners haven’t been willing to make introductions. If givers are losing clients to competitors with a better suite of integrated services, they need to consider a lateral move. But takers need to assess whether moving to another firm with “a better platform” is really a solution. Before seeking out “a better platform,” ask yourself these questions:

- Do lawyers in your specialty typically get work from other lawyers in their firms? Is your expectation realistic that a firm with a better client base will help you?
- Are there lawyers in your current firm who could have introduced you to their clients and didn’t? If not, why not and why would the situation be different at another firm?
- How much effort and time will it take to establish a level of trust with partners in a new firm before they are likely to introduce you to their clients? Do you have any existing relationships in other firms under consideration which would accelerate the process?
- What mechanisms exist in prospective new firms to support your entrée to other clients of the firm? Are the firms good at encouraging cross-selling between practices and offices or is it just lip service? Can you talk to other recent lateral partners to assess their success with similar strategies?
- Is there a less radical or risky way for you to get access to the kinds of clients you need to meet other than moving to a new “platform”?

Example: A partner with a significant book of business was recruited to a new firm with the promise that she would be made the head of her department and provided with many resources to grow the practice, including access to many of the firm’s clients. She was made the nominal head of the department but encountered resistance from other lawyers when she sought introductions to their clients even though she was generous in offering reciprocal introductions to her clients. The firm’s management did not intercede or otherwise facilitate access to firm clients. The situation deteriorated further when the firm brought in another leader in the same practice with an even bigger book of business. She reluctantly decided that she had to make another move. When her old firm approached her and laid out a plan with specific commitments from a number of partners, she concluded that she had more opportunities at her old firm than she had assumed. She fortunately had not integrated the clients she brought with her into the new firm and was able to return to her original firm with her book of business relatively intact but with a great deal of disruption and embarrassment along the way.

Before seeking out a better platform at another firm, have you thoroughly exhausted the possibilities in your current firm and weighed the risk that the challenges at a new firm will be largely the same?