



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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Internal Beauty Contests: Using Requests for Proposal (RFPs) Within Your Firm. If it has been challenging to identify the right lawyers in your firm to work on matters outside your own specialty or hard to entice them to work on matters for clients other than their own, could you use the process your clients often rely on in selecting new counsel? RFPs, a standard selection tool used by your clients, may also be a useful approach inside your firm if you are in one of these situations:

- You are new to the firm and do not know lawyers in practice groups other than your own;
- You are not getting diligent or timely help in identifying other lawyers for your matters;
- You would like to be able to evaluate which lawyers to select based on their relevant experience, not just accept an assignment of someone you don't know;
- You need to be able to assure your clients that other lawyers who will work on their matters are highly qualified, highly motivated, and have the time to devote to their matters;
- You would like to inject some competition for the opportunity to work on your clients' matters and heighten the level of commitment of other lawyers about joining your client team;
- You are inclined to use a lawyer from another firm whose work you know and respect but want to give your firm a fair shot at the assignment.

Your clients rely on you to organize and manage a team that can meet their needs. If the other lawyers in your firm who work on their matters don't do a good job, you not only jeopardize your ability to expand their work, you also put your own relationship at risk. If your firm's assignment process is not working well enough for you, could your own internal RFP, or some version of an RFP, improve the quality of the teams you put together for your clients?

Example: A relatively recent lateral partner received a major new matter from a client and needed to assemble the right team, including lawyers from other practice groups, to handle it. Having had an earlier experience in which a practice group leader had assigned an inexperienced associate to one of his matters and then had failed to oversee the associate's work, the partner approached the task of assembling a team differently. He prepared a short, RFP-style questionnaire and then asked the practice group leader to invite a few partners to respond by a specific date to the questionnaire. The questionnaire described the new matter and asked each partner to list their relevant experience, including the parties involved, the results and total costs of each matter; their current hourly rates; their availability; which associates they would involve; and their level of interest. Two partners responded to the questionnaire and the lateral then interviewed each one. The lateral could then tell his client that he had selected a lawyer for the team who had favorably completed many similar matters. The lateral also felt more confident that he had a strong commitment from the partner he selected. The practice group leader, who had been reluctant initially to circulate the questionnaire, was pleased to have handled the selection process in a way that satisfied the lateral and the client, and took less of his time.

If you are not getting the level of support you need in identifying the right lawyers in your firm to work on your matters, can you adapt the RFP process to screen lawyers more efficiently and to attract the most qualified and committed people?