



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*

Volume 10, Issue 17

August 8, 2016

When You Are Not the Front Line Lawyer. If you have been concerned that you are not getting the credit you deserve for the work you have done in solving client problems, you are not alone. Many lawyers, particularly specialists, are excluded from interacting with clients by the lawyers who control the client relationship. Excluded lawyers may suffer adverse consequences but more importantly, there are clear risks to clients when the most knowledgeable lawyers are excluded from discussions of their conclusions. If you are faced with a non-inclusive client relationship partner, consider these strategies:

- Request from the outset that you have client contact on matters. If you cannot make such a request, at a minimum, ask whether it would be beneficial to the client to have access to you especially for questions about your recommendations.
- Build a feedback loop into your work. If some of your conclusions depend on the client's response or feedback, your continued, direct involvement may be more compelling.
- Seek work from client relationship partners who are collaborative and inclusive. When you are asked for comments on others, like in year-end self-evaluations, note their inclusive behavior.
- Join client teams when they are available. Advocate for client teams if they don't exist.
- Whenever you see the risk of poor results or greater expense if you are not involved directly, identify those risks in your offer to engage with the client in your area of expertise.
- Encourage the clients with whom you do have contact to help insure you are invited to key meetings, conference calls or hearings.
- Model the behavior you expect from seniors by advocating to invite more junior people too.
- When dealing with lawyers who do not fully acknowledge your role, share your work with as many people as is appropriate so it is harder to disregard your contribution

Contact with clients, particularly face time, may advance the careers of lawyers who do not control the client relationship but more critically, helps insure better quality results.

Example: The client asked the lead lawyer on a matter to confer with a lawyer in another firm who is a specialist in one aspect of the matter. The client told the specialist in the other firm that she had asked the lead lawyer to reach out and that the client expected to be billed for the work. When the lead lawyer called the specialist, he asked for advice orally but did not request anything in writing. The specialist was concerned at many levels about the nature of the interaction. To ensure that there was no miscommunication about the advice, and to ensure that his role in the matter was clear, the specialist did several things. He sent an email to the lead lawyer to thank him for consulting with him and cc'd the client. The email summarized the substance of his advice and noted some areas in which the advice was dependent on further investigation of the facts. When the specialist billed the client, the billing also contained a detailed description of the nature of the work. When the client later invited the lead lawyer to meet to discuss the matter, the client asked that the specialist be included as well.

When you are contributing valuable advice, your career-- and your clients-- may benefit from your having a seat at the table when your firm reviews that advice with the clients. The question to raise on every engagement is whether the client is missing value by not having access to all the talent. Be wary of client relationship partners who tightly control client access. Restricting access to parts of the team—especially for the wrong reasons—in the end shortchanges the client and puts the client and your firm at risk.