



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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Breaking the Cycle of Gatekeeping. Many firms convey mixed messages on business development. The firms hold themselves out as collaborative, promoting client teams and other cross-selling initiatives. But often powerful partners resist these initiatives and hold their clients tightly to themselves. What is the right response in this situation: being a team player or becoming a gatekeeper yourself? To evaluate your options, try to get clarification at firm meetings and practice group meetings about the firm's policies:

- Are there formal or informal client teams and how do new people join?
- Do all team members have direct contact with the clients?
- Does the firm give some type of credit to lawyers who expand work from existing clients or derive work from a new source at a big company?
- Does the firm reward lawyers for integrating new lawyers into client relationships?
- Is there a process for grievances over allocation of credit for new business?

If there are firm committees addressing these policies, volunteer to participate. If there is still internal jockeying for control of clients or allocation of origination credit, be prepared to assert yourself on these issues in a timely way or find a champion to do it for you. You cannot afford to leave to chance that your business development activities—and particularly your successes—will be noticed, quantified and rewarded.

Example: You are an income partner with a client who calls you directly on matters in your practice area. You report this information in annual self-assessments and your reviews have acknowledged the strong relationship. You have never asked for any billing or origination credit nor has the billing partner offered to share credit or to make you the billing partner on any of the new matters. You have never raised the issue with the client but believe that if you left the firm, you could take work in your practice area with you. You are concerned how you will be evaluated for full partnership and have considered looking elsewhere.

You have a choice: you can ignore the fact that your contribution has not been formally recognized and hope that your importance is well understood or you can take action. If you are uncomfortable talking directly to the billing partner, then seek advice on how to be treated fairly from the most senior partner in the firm with whom you have a relationship, preferably one involved in firm or practice group leadership. Do not suggest that you are considering leaving the firm and above all, do not threaten to leave. You don't have to. But you do have to help insure that your firm rewards collaboration.

You are not just protecting yourself. Lawyers who build the best teams also build the biggest books of business. And firms which foster the best business development teamwork are the fastest growing and most profitable firms in the country.