



# Training lawyers to be business developers – A curriculum for success

BY **EMILY MORROW**

ALMOST DAILY A CLIENT WILL SAY SOMETHING ALONG THESE LINES to me: “[name of a lawyer] would make a great partner in this firm if (s)he could only develop and manage a successful partner level practice. Unfortunately, however, (s)he lacks those skills. Can those skills be learned and, if so, how?” I usually reply: “So, is this individual a good – or even great – lawyer but not adept at business development? How important is it to your firm to train your lawyers to be successful ‘rainmakers?’”

Younger solicitors often say to me “I know I need to demonstrate the ability to build and manage a practice before I will be seriously considered for partnership, but I don’t even know what I need to know.”

Despite business development skills being critical to professional success in the law, very little emphasis is given to teaching lawyers what this means. Sometimes a partner mentors a solicitor, opens doors and champions that person’s success. However, because mentoring younger lawyers about how to build and manage a practice usually involves non-billable time, it tends to take a back seat.

Business development skills can be taught and learned like other professional capabilities, assuming an individual is motivated; understands why and how the skills correlate with professional success; receives support; and is provided with the necessary training. Although some lawyers are natural business developers, everyone can enhance these skills and benefit from doing so.

## The curriculum model

What might be included in a curriculum to teach business development skills? What are the core capabilities and how do you “teach” them? There are general skills and also some quite specific capabilities.

The general skills consist of:

- The ability to influence others effectively (without being manipulative) and build high trust professional relationships;

- Networking;
- An overview of what business development means in the context of the law;
- How to prepare/implement an optimal business development plan; and
- Gravitas, self-presentation and communication skills.

The more specific skills include:

- Public speaking – excellent oral communication skills for appropriate “audiences”;
- Writing professional articles – excellent written and promotional skills;
- Developing an online presence;
- Becoming involved in the larger community to enhance your professional profile;
- Converting a potential piece of work into a new instruction;
- Delegation, leading a team, pricing work for clients, billing and related skills which become critical as one’s practice grows.

That said, such a curriculum must be tailored to the needs of a particular firm. For example, if a firm is focused primarily on high net worth individual clients and their businesses, certain strategies will be appropriate. Conversely, if a firm is targeting large, institutional clients or public sector/government work then different capabilities may be needed.

Training of this type can be done with groups of various sizes. If the group is relatively small, then the approach can be more interactive and hands on. If, instead, the training is offered to a larger group, then I generally intersperse lecture style presentations with interactive exercises. In either instance, one must provide skills that are immediately useful. I often develop realistic hypotheticals for individuals and groups to work on and practice the capabilities we have discussed.

Here is what a sample curriculum might include:

**Business development:** An overview focusing on the basics of business development including networking, public speaking, article writing and general “do’s and don’ts”. The approach needs to be practical and results oriented with an outcome of giving participants an overall understanding of how to build a practice and the tools to do so.

**Influencing/relationship building skills:** The ability to influence in both formal and informal settings is critical to success in building a professional profile. This capability is key to the

other necessary “soft skills”, including work on temperament, communication skills, strategic questioning and professional relationship building/networking in a business development context. This works well as a “prerequisite” workshop and is best offered early in the process.

**Networking skills:** Understanding what networking is (and is not), why it is critical to have a high functioning network, identifying different networking styles, and developing a strategic networking plan are all key skills. This segment can also address how to “convert” a professional relationship in one’s network into a new instruction, “cold” versus “warm” calling and the like.

**Preparing and implementing a business development plan:** A key component to building a successful practice and professional profile is having a roadmap that gives your efforts direction and coherence. Such a plan must be practical, tailored, achievable and yet challenging. I often provide participants with a business development plan template and suggestions on how to draft their own plans. We also discuss how to develop a compelling “individual brand” and an excellent “elevator speech”.

**Oral presentations:** Knowing how to do the following is critical:

- Identify the best public speaking opportunities and ideal audiences;
- Obtain public speaking opportunities (“get the gigs”);
- Prepare a presentation that will resonate with a particular audience including how to choose topics;
- Capitalise on the benefits of a presentation and subsequently obtain new instructions and build one’s professional network; and
- Develop self-presentation skills: how to be appealing, interesting and memorable in a good way.

**Writing articles:** Similarly, knowing how, when and what to write is important including:

- Identifying the best opportunities and publications;
- How to get your article published quickly and reliably;
- Writing articles that will interest your optimal audiences - choosing topics;
- Using your articles and public speaking



to reinforce each other to build a profile;

- Capitalising on the benefits of articles to obtain new instructions; and
- Tailoring your writing style and content to your audience.

**Community involvement and professional profile raising:** This workshop can focus on the role of community involvement in building an external profile, including identifying and evaluating opportunities, serving on high profile boards and other positions, pursuing leadership opportunities and the like. In other words, how to get the greatest benefit from investing time and energy in non-billable engagement in your community.

**Delegation, team building and management:** If a lawyer builds a successful practice, then knowing how to delegate optimally, build and manage a team, negotiate costs for work and bill effectively become key skills for professional “survival” and client care. Such skills include how to triage work to team members, keep work flowing through the team, cultivate/retain team members, enhance communication with clients and work smarter rather than harder.

Lawyers know how to think critically, to learn new skills and use knowledge. Nevertheless, many lawyers are not good

practice builders and/or managers. The secret is to do things: firstly, give lawyers the tools they need to be effective business builders and then do so in a way that is direct, achievable and non-confronting. This can be easier said than done. Having spent many years building a successful law practice myself and then working with other lawyers to help them do the same, I’ve given a lot of thought to what works (and doesn’t work). Hence this article.

I have found it is best to be flexible, go with the energy that is already there, make the process engaging and see what works for each group. Whether it’s making a cold call to a prospective referral source or client, lining up a speaking engagement, pitching an article to a top publication, networking one-on-one or in a group, it’s critical to remember that “nothing ventured is nothing gained”. Also, learning how to do things right the first time avoids needing to break a lot of bad habits later on. ■

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