



CALSS
 Colorado Association
 of
 Legal Support Staff

DeNovo

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From the Editor

We are always looking for contributors to the De Novo. If you would like to submit an article to be considered for publication, please contact me at vschermerhorn@sgrllc.com. I would love to hear from you about any learning experience you have had, a seminar you attended, or a matter of general interest to De Novo readers. Also, if there is anything you would like to see information on, please send me suggestions and I will see what I can find on the topic. I look forward to hearing from you!

Ginny Schermerhorn, Bulletin Editor

Just Like Athletes, Lawyers Can Benefit from (Business Development) Coaching

By: Janet Ellen Raasch

Professional athletes rely on their coaches – experienced individuals who help them hone their performance skills, create focused competition strategies and maintain a high level of motivation over the course of a career.

Similarly, a good coach can help any lawyer who is thrown into the competitive arena of business development.

Business development skills are rarely taught in law school. If these do not come naturally to you, a coach can help.

Business development strategy is hard to formulate in the daily scramble to produce quality work for your clients. If such focus does not come naturally to you, a coach can help.

The motivation to engage in business development activities runs hot and cold. It may be sparked by a good article, speaker or training session, but can be difficult to maintain. If you find it difficult to stay motivated, a coach can help.

A panel consisting of two attorney coaches and one coached attorney discussed business development coaching in a presentation at the monthly meeting of the Rocky Mountain Chapter of the Legal Marketing Association (www.legalmarketing.org/rockymountain), held June 14 at Fogo de Chao restaurant in downtown Denver.

Panelists included Mark Beese, president of Leadership for Lawyers (www.leadershipforlawyers.com); Karen Samuels Jones, a real estate partner in the Denver office of Perkins Coie LLP (www.perkinscoie.com); and Bob Weiss, president of Alyn-Weiss & Associates (www.themarketinggurus.com).

What is attorney coaching?

Business development coaching and business development training are often confused. They are quite different. Coaching involves a confidential one-to-one relationship between an attorney and a coach, and involves scheduled interactions over a course of time (often a year). Training usually takes place in a group setting, with little follow-up.

“When more than one lawyer at a firm is being coached at the same time, there is some benefit in combining coaching with training,” said Beese. “Monthly group sessions can address general concepts and expectations, offer cross-selling opportunities and provide a venue for sharing success stories and asking for advice.

“Individual coaching sessions – either in-person or by phone – can focus on the development of individual business development plans and the skills, strategies and motivation needed to implement those plans,” said Beese.

At the same time, coaches need to understand the realities of legal work. “Even lawyers who develop the best of habits will drop these habits when they get busy,” said Beese. “A coach knows when to step back, and then re-engage when the time is right.”

“Under normal circumstances, I like to handle most of my own business development efforts,” said Jones. “For example, I usually answer all of my own ‘cold’ phone calls. But when I get really busy, it is helpful if our marketing group can screen calls and take good notes. When things calm down, I pick up right where I left off.”

All too often, lawyers are exposed to a lot of random information about business development – but do not know where to start. “This is where a coach can add value,” said Weiss. “Where does the lawyer want to end up? What is the first step he or she should take to get there? What comes next, and next, and next?”

The coaching function can be provided by an internal expert (in the case of many large law firms) or an outside consultant. There are pros and cons for each.

Inside coaches often are more aware of institutional culture and cross-marketing opportunities. Since they are on-site, inside coaches are more available for casual “drive by” consultations and advice on projects that require a quick response.

On the other hand, inside coaches are more likely to get bogged down in conflicting responsibilities and putting out fires -- and therefore have less time for scheduled appointments. The lawyers at a firm tend to perceive an internal coach as an employee who should take direction from them rather than giving it to them. Lawyers often feel uncomfortable discussing personal issues with an employee.

“Attorneys will always take a paid consultant more seriously than a salaried staff member,” said Weiss. “An outside coach has much more bandwidth and is bound by a confidentiality agreement,” said Beese. “He is focused on just one thing. He schedules time for appointments and also for appointment preparation.”

Who can benefit from attorney coaching?

The panelists agreed that the best candidates for coaching are senior associates and junior partners who need to learn how to build and maintain their own books of business, and also new laterals who need help with the transition to a new firm culture. Many firms also hire a coach when their long-time rainmakers near retirement or become ill, leaving the firm suddenly bereft of rainmaking talent and a pipeline of new business.

“Not all good lawyers are good candidates for business development coaching,” said Weiss. “Half of the lawyers at any firm will be ‘below average’ in business development skills and potential, and realistically should be given some other support role to play. A good writer, for example, could write a speech for a rainmaker to deliver.

“In addition, law firms have an unfortunate tendency to select their ‘problem children’ for coaching,” said Weiss. “Even with the best of coaching, it is unlikely that these individuals will ever succeed. Instead, law firms should select attorneys at the right stage of career development, who have innate ability and a true desire to do what it takes under the direction of a coach to develop new business.”

“Coaching candidates must be willing to make a time commitment of 10 to 15 hours per month,” said Beese. “No one should be forced to participate. In fact, it’s a good idea to make your lawyers apply for the ‘privilege’ of business development coaching.”

A good coach will work with each individual attorney to arrive at a customized goal that lies at the intersection of that lawyer’s personal and professional interests and abilities.

With this goal in mind, the coach will help the lawyer determine a plan (the specific tactics and activities that support those goals) and a timeline for each. To be successful, tactics and activities must fall within a particular lawyer’s comfort zone. Finally, the coach will meet regularly with the lawyer to monitor “homework,” offer suggestions and support, amend the plan and timeline as necessary, and set new goals going forward.

Jones has worked with three different business development coaches over the course of her career – including both Beese and Weiss. “Each coach brought something different and valuable to the table,” said Jones. “Also, you sometimes get into a routine. Changing coaches can get you re-energized and keep you up-to-date with strategies that work for marketing.

“When I started with a coach, I was told it would help me find more business – and it did,” said Jones. “What no one told me up front was how much work it would be, and how that hard work would lead to positive changes in not only my practice, but also my life.”

EDITORIAL COMMENT: I have included this article to spark your thought processes as to how you might coach the attorneys you work for. I currently have a brand new Associate at my firm and am finding ways to coach him in utilizing my Paralegal skills.

Effective Law Firm Administration Depends upon Connecting with Others

By: Janet Ellen Raasch

One of the key responsibilities of a legal administrator is the need to interact effectively as a leader with lawyers and staff – one-on-one or in groups – in order to get things done.

In addition, legal administrators need to build and maintain networks of people that they can rely on for support in their professional and personal lives.

Personal interaction styles and networking skills were discussed by speaker and author Sarah Michel at the annual retreat of the Mile High Chapter of the Association of Legal Administrators (www.milehighala.org) held Feb. 29 and March 1 at The Historic Stanley Hotel in Estes Park, Colo. The retreat was attended by 72 members and guests.

Michel works with organizations and associations to create behavioral changes by teaching people how to connect with each other. Her company, Perfecting Connecting (www.perfectingconnecting.com), is located in Colorado Springs, Colo.

The way we influence others

Interactive styles are created by combining the way in which we influence others (by directing or by informing) with the role we tend to play during interactions (initiating or responding) to yield four distinct communication patterns. (The patterns are dealt with in more detail in the next section.)

“It is essential to understand that no single leadership interaction style works for all people in all situations,” said Michel. “Each has positive aspects, but each can also generate negative reactions from those you are trying to persuade.

“The important thing is to be aware of your own personal style as well as the styles of the individuals you are interacting with when you are attempting to influence or achieve a common goal,” said Michel. “It is also important to know that you can consciously modify your style in order to bridge gaps and be a more effective leader.”

Directors focus the way they influence others on the specific task at hand and the achievement of quick results. Their intent is to give structure to the project and to direct the actions of others. “With words, directors tell, ask, direct and urge their colleagues to action,” said Michel. “With their bodies, they stride forward purposefully. They point.”

On the negative side, directors are so certain that they are right that others might perceive them as bossy. “Directors are often surprised when they meet with resistance,” said Michel. “When working with an ‘informer,’ directors can be frustrated by the lack of a clear position and can grow impatient with a lengthy process.”

Informers focus the way they influence others on the process and motivation of their colleagues. Their intent is to give information, seek input from others and inspire (rather than demand) action. “Informers use words to explain and describe,” said Michel. “They use flowing, open and eliciting body language to encourage participation.”

On the negative side, informers can be perceived by others as indecisive. “Informers are often surprised when no one takes action based on the information they have provided,” said Michel. “When working with a ‘director,’ informers can be offended at being told what to do rather than consulted.”

Michel demonstrated this difference with the example of a senior lawyer who was an ‘informer’ working with three junior lawyers who were ‘directors.’ The senior lawyer gave the juniors a program brochure with the comment that it looked like an excellent event. Later, he was upset when the juniors did not attend. “If he wanted us to go, why didn’t he just say so?” was the response of the juniors. Both parties felt misunderstood.

The role we play

Initiators set the pace and tone of an interaction by focusing on their external world. Their intent is to reach out to and interact with others. “Initiators are often the first to speak,” said Michel. “They interrupt. They are extraverted and gregarious. Non-verbally, they are fast-paced and active.”

On the negative side, initiators can be perceived by others as intrusive. They are often surprised when others do not want to talk or provide feedback. “When working with a responder, initiators can be impatient with the slow pace or with feedback that comes after the initiator thought a decision had already been reached,” said Michel.

Responders set the pace and tone of an interaction by focusing on their internal world. Their intent is to reach inside and reflect before agreeing or disagreeing with an idea or a course of action. They are more solitary and harder to get to know – but their subject-matter expertise can be very deep. “When dealing with responders,” said Michel, “give them some time to think and react. Don’t crowd them.”

On the negative side, responders can be perceived by others as cold or withholding. Responders are often surprised to find out that others think that they are ‘mad’ at them or unhappy with a proposed course of action. “When working with an initiator, responders can feel pressured by the pace and frustrated by a lack of time to reflect,” said Michel.

Michel illustrated this difference by talking about the ways initiators and responders “recharge their batteries” after a hard day at the office. “An initiator will want to go out with others to a social venue and talk about what happened. Initiators ‘recharge their batteries’ by interacting with other people. A responder will want to spend time alone to ponder what happened. Responders ‘recharge their batteries’ with solitude.”

The way we influence others + the role we play = interactive style

In-Charge leaders are ‘directing’ in the way they influence and ‘initiating’ in the role they play. They like to get things accomplished by quick decisions, mobilizing resources, removal of obstacles and rapid action. “They believe that it is worth it to go ahead and act or decide,” said Michel.

Chart-the-Course leaders are ‘directing’ in the way they influence and ‘responding’ in the role they play. They like to have a course of action to follow and they like to keep themselves, the group and the project on track. “They believe that it is worth it to think ahead to reach the goal,” said Michel.

Get-Things-Going leaders are ‘informing’ in the way they influence and ‘initiating’ in the role they play. They like to persuade and involve others in a group project – and facilitate the process. Their enthusiasm can be contagious. “They believe that it is worth it to involve everyone and get them to want to proceed,” said Michel.

Behind-the-Scene leaders are ‘informing’ in the way they influence and ‘responding’ in role they play. They like to get the best result possible. “They believe in the worth of quietly and calmly integrating and reconciling many inputs – often one at a time – in order to arrive at an informed decision,” said Michel. “This style of leader in particular has to be careful to avoid ‘analysis paralysis.’”

If individuals become polarized along their interactive styles in the course of a project, the inevitable result will be miscommunication and misunderstanding.

“It is easier for those who share at least one element – either the way they influence or the role they play – to get along,” said Michel. “Build on the characteristic that you have in common and work around the characteristic where you differ.”

The most damaging conflicts arise between those with no shared characteristics. “Most commonly, In-Charge and Behind-the-Scenes leaders clash in interactions involving control of the process – individual versus consensus,” said Michel. “Chart-the-Course and Get-Things-Going leaders clash over the pace of the process – long-term strategy versus immediate tactics,” said Michel.

By understanding your own interactive style, law firm administrators can maximize the positive while reining-in behaviors that might be perceived by others as negative. By understanding the interactive styles of others, they can appreciate their strengths while understanding their behaviors as unique styles – not personal attacks.

Connecting the dots

“Understanding your interaction style also plays an important role when you ‘connect the dots’ in order to build networks of people who can provide you with the information you need to be successful in your professional and personal lives,” said Michel. Michel discussed the formation of social networks in a separate retreat program.

“These networks constitute your ‘social capital’ or ‘net(work) worth,’” said Michel. “They are just as valuable as your financial capital and your financial net-worth.” Michel defined ‘connecting the dots’ as a six-stage process.

Stage one is *Self-Assessment* and includes an honest assessment of your own interaction style, your own natural talents and skills, and how you can act as a resource for others. “Before you go out in public, spend some time developing a short statement of your unique talents and skills that is concise, catchy and clear,” said Michel.

Stage two is *Do Your Homework* and includes advance preparation for any connection opportunity – like a meeting or an event. “These can be formal events like ALA programs or informal events like your child’s soccer game,” said Michel. “In this day and age, they can even be online social networks like LinkedIn. What are your intentions for this opportunity? Whom do you want to meet? What might you have in common?”

Stage three is *The Initial Meeting* and includes your first conversation with a possible connection. “Anyone within three feet of you is a potential network contact,” said Michel. “Ask open-ended

questions to determine how you might be a resource for the other person and how the other person might be a resource for you.

“Productive relationships take work,” said Michel, “so decide at this stage if this person is a useful contact and if you are willing to work on ‘connecting the dots’ in a way that honors the style of both parties.”

Stage four is *Connecting the Dots* and includes the hard work of examining your existing network to find someone who might be able to help this new acquaintance. Is there a way in which these parties can help each other? Are their interactive styles compatible?

Stage five is *Follow-up* and includes doing what you promised to do in your conversation – sending information to or making the introduction between members of your network. “If you are able to help someone, graciously accept their thanks,” said Michel. “If someone helps you, express your gratitude. Circle back eventually to let the person know how the connection worked out for you.”

Stage six is *Committing to Building the Relationship* and includes ongoing maintenance of your network. “Get your network out of your head and out of your Rolodex and into a CRM system – where it is much easier to maintain and work with,” said Michel. “These systems will keep track of your contacts as well as your interactions (including reminders) – allowing you to ‘connect the dots’ in as little as one hour a week.”

Personal interaction styles and networking skills can help legal administrators and others change their behaviors in order to connect with each other – in project teams and networking situations.

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**UPCOMING EVENTS:**

**September 16-17, 2011** will be the CALSS Fifteenth Annual Meeting and Educational Conference and will take place at The Embassy Suites in Fort Collins, CO. Watch your e-mail and the CALSS website, <http://www.calss.org/>, for details.

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**ABOUT DeNOVO:**

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