



## Professional Development: Teaching Others to Deliver

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On the topic of leadership, Albert Schweitzer stated, "Example is leadership" and observed that "Example is not the main thing in influencing others. It is the only thing." We learn optimally by observing best practices and adapting these as our own. Client service is one such practice that is furthered by example. Here are seven project management insights that demonstrate how senior practitioners, leading by example, can teach junior attorneys how to focus on their client deliverables.

### Lay the Foundation

Get everyone up to speed on the project before putting pen to paper. Lay the foundation of the assignment by telling its story and providing key details. In the long run, providing a group or one-on-one discussion upfront will be a saving, both in terms of time and cost: The team will have the context necessary to effectively complete its role in the project. Working in a vacuum produces piecemeal. Understanding the total project produces strategic results.

### Dinghy vs. Cruise Ship

Ensure that everyone on the team understands the scope of the project and is consistently addressing the main issue. Is the goal of the project to create a cruise ship (client wants all the stops to be pulled out, exhaustive research, and complex memos) or a dinghy (tight focus on answer, hours and product)? Or, like a speedboat, does it lie somewhere in between? Building in checkpoints and follow ups with the team will allow you to monitor process and targets, and determine that the project is progressing well. It will also allow team members to check in and follow up with any concerns they may have on their specific assignment or the project as a whole. Keeping everyone focused on the main issue will allow incongruities to surface before the project is due and, if re-addressing of the main matter is required, the time necessary to refocus energies.

### Prepare and Plan

Regardless of how expert one is in his or her area of law, preparing and planning will ensure the project's ultimate success. Let team members see how effective you are by the measures you apply and consistently use to make your matter flow efficiently throughout its mandate. Strategizing for and successfully conducting client and internal communications, meetings and appearances is a crucial proficiency to teach. Demonstrating the usefulness of outlines, precedents and samples will prevent unnecessary sloppiness and ad hoc tendencies. Understanding that working "smart" produces results and commits one to ongoing excellence is a lesson that is never too late to learn.

### Practise in Real Time

Time management is a misnomer: Regardless of what we do, time will pass. Where we do have control is how we manage ourselves within our time constraints. Set real project deadlines and keep the team focused on meeting these targets. Gauge quantity and quality of information received within the established timeframes. Depending on results obtained, modulate amount of work assigned as well as frequency of supervision. Adjust and revisit throughout the project.

## **Build Trust and Relationships**

Communicating with your client (both internal and external) is essential for the success of the project and key to deepening your client relationship. Demonstrate to the team how open communication leads to trust, how trust needs to be earned and, once earned, how trust needs to be maintained and developed. By doing so, you will help them to focus on client service, viewing projects as investments in the larger relationship, not as discrete, unconnected assignments. Determine at the outset of the project, and monitor throughout, the extent to which the client wants to be involved in the project and how they are to be kept in the loop (e.g., in person, phone, e-mail, cc-ing, etc.). Let it be understood by the team that they are building fluid relationships, largely determined and sustained by trust, expectations and perceptions, and that each relationship is unique.

## **Take Constant Inventory**

Working toward a common goal is a huge investment in communal success. Your role does not end with your delegation: do not let any of the team flip in the wind. A strong leader will allow for follow-ups, provide constructive feedback and guidance as required, enabling all project members to contribute successfully. Keep abreast of all aspects of the project, whether through appointed "lieutenants," group or one-on-one meetings, document drafts or open door access. There should never be any surprises.

## **Deliver the Goods**

Treat the delivery of the finished product as an opportunity to have quality face time with your client. Not doing so is a missed opportunity: The client has a lot invested in the project and this importance for them needs to be acknowledged. Instill in the team how the reward for doing a great job is more, challenging work. For both the client and the team, great client service will create great satisfaction and will further great opportunities through a great relationship.

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