

## The Practice Group Leader as Change Agent, Part 1

By [Susan Raridon Lambreth](#) on November 17, 2020

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Even when business is rolling along as usual, Practice Group Leaders are among the most essential players in achieving a law firm's long-term success. They help the group's lawyers set and achieve well-defined goals related to strategy, market position, talent acquisition and development, firm culture, and profitability.

So, it stands to reason that during a time of accelerating change, i.e., right now, the most effective PGLs play an even greater role: that of change agent. This ability to be champions of change during periods of volatility is leadership at its finest. During tumultuous times, leadership is a response to external change and uncertainty. Change agents cope with shifts in the external environment by mobilizing their constituents to respond, perhaps by moving in a whole new direction. Harvard University research has shown that during episodes of tremendous change, the people within an organization express a greater need for leadership. PGLs can deliver that leadership. But, first, they must understand the role and embrace the function of change agent.

### Leading Change is Challenging

According to a 2014 [Forbes magazine](#) article of the same name, every leader must be a change agent or face extinction. If you didn't get the memo back then, it's even more true today. Like it or not, Practice Group Leaders are front line agents of change. How can they comfortably and credibly step into that role, providing the leadership that people crave? After all, few PGLs think of themselves as change agents or understand their role in that way. This is a problem, because a change agent mindset is a critical element of success in these roles. Coping with change is challenging enough in any business organization. But law firms have a few additional hurdles that are absent in most other businesses.

First, the nature of law practice requires lawyers to protect their clients. To do this, they proactively hunt for problems, maintaining a suspicious and vigilant stance in dealing with others. This responsibility, and the training that equips lawyers to carry it out, breeds a very change-averse and risk-avoiding outlook. Moreover, research by one of the authors into the personality traits of lawyers repeatedly demonstrates that individuals who enter and succeed in the legal profession have disproportionately high levels of skepticism compared to the general public. This personality trait strengthens and reinforces the outlook cultivated by their training, thus imposing not one but two layers of skepticism, change aversion, and risk aversion.[1]

Further compounding these challenges is the fact that law firms are owner-run businesses with a small number of top business producers. These top producers essentially control the decision-making in most firms. In many instances, these decision-makers do not want the firm to take action that could adversely affect their current position and earnings. The most recent Altman Weil survey, *Law Firms in Transition*, reports that 70 percent of leaders surveyed indicated that the reason they do not implement more change initiatives in their organizations is because partners resist most of these efforts. This happens despite client pressures and urgent market imperatives.

Another issue affecting the ability of law firm leaders to effect change in their organizations is the insecurity many lawyers feel today in response to the tremendous upheaval occurring across the profession. In the late '90s, while leading a PGL training workshop, our Harvard University co-presenter turned to the group of PGLs from various firms and said:

“It’s a myth you can’t teach old dogs new tricks. The research now shows you can teach people way into their 80s. What you can’t do is teach ‘scared dogs’ new tricks.”

A light bulb went on for us. We were seeing lots of “scared dogs” in our practice – lawyers nearly paralyzed from the rapid rate of change, understandably skittish from an onslaught of dot.com explosions and technological juggernauts. Today, the pace of change is arguably even faster and particularly in the midst of the pandemic, there were many more “scared dogs” in the practice groups that PGLs are trying to lead. You cannot turn a blind eye to uncertainty and lawyer insecurity. To do so is to doom change efforts to failure.

## Change is Vital to Sustainability

A change agent by definition has just two primary tasks:

1. Setting a new direction; and
2. Mobilizing constituents to move in that direction.

Setting a new direction can be challenging enough, particularly when most change is initiated before there is sufficient information to be entirely sure that it’s the right direction. But most lawyers, because of their high intelligence and strong analytical abilities, are able to do this fairly readily.

The biggest challenge comes in mobilizing other lawyers to follow their lead. It is a road littered with obstacles. In most law firms, lawyer complacency or inertia is the first roadblock. And practice groups that have experienced success in achieving their goals despite or even because of the changing environment are the most vulnerable to this type of complacency. In today’s climate, *every* PGL in *every* firm should be thinking seriously about how to meet today’s evolving market needs, even if—or *especially* if—your PG has had many years of strong profitability and growth. While most, if not all, lawyers have been forced into change they never wanted because of the pandemic, there can still be a reluctance to depart from well-worn paths that worked in the past – in recruiting, talent development, management of the legal matters, attracting clients and pricing – just to name a few areas in need of change in many practice groups.

New competitors for all levels of legal work are entering the market daily. Well over \$1 billion was invested in legal start-ups last year alone. Law firms that were successful just a few years ago are folding or merging in order to survive today. If a PGL does not keep his/her group moving forward and changing to be relevant in the market, the group runs a strong risk of losing market share and declining. Thus, the number one mission of a PGL-as-change-agent is to mentally embrace change. PGLs must err on the side of believing that change is inevitable and necessary, and that anticipating market moves and taking bold action to prepare for it is vital.

## How to Be an Agent for Change

Whether you are in a corporation or the legal arena, common characteristics of change agents include:

- Clear vision
- Targeted planning and focus
- Ability to inspire
- Ability to experiment
- Role modeling/leading by example

- Building trust relationships
- Patience and persistence
- Resilience
- Servant-leader mindset

In this first article, we'll cover the first four. These important characteristics are described below. We offer experience-based advice on how you can implement or work on each one to give your PGLs the greatest chance of success. Please continue reading our next article for descriptions of the remaining five characteristics.

## Clear Vision

Both research and common sense tell us that people are more likely to follow a leader when the leader presents a clear vision for the future. The firm's vision, incorporating the next three to five years, is critical and should drive the way PGLs spend their time. If PGLs are unclear on even a general sense of vision for their particular group, they should begin by interviewing clients and examining competitive intelligence. Many lawyers tend to be more focused on details rather than on the big picture. If practice groups lawyers offer few insights, PGLs should not hesitate to gather additional input from more visionary lawyers in or outside the practice group as well as other business professionals in the firm to help shape or flesh out the vision for the group.

The vision should be inspirational and based on the values that drive your firm. How will the Group look after the change? It is important to help people see the vision and understand why it is necessary. To do this, you must communicate the imperative for change and build a sense of urgency. Mobilize people to want to change. You do this by tapping into the heart of the firm, where the values lie. This is what drives meaning, in addition to profitability, in your firm.

Many groups have a business plan. This is an important part of generating buy-in and change in the group. (See below.) But a business plan is not a vision. Even without a formal plan or before one is developed, the PGL should have a vision, including a handful of strategic priorities, that are critical for the group. The vision informs the implementation of the practice group business plans and goals. If your plan came before the vision, that's okay. Just make sure you revise it to reflect the vision.

Once you have a vision in place, you must communicate it succinctly and often. It must be understandable and easy to communicate. If the lawyers can't explain it in a two-minute elevator speech, preferably even faster, it's not compelling enough. PGLs can inculcate the vision into the fabric of the practice group by using it to drive how they speak, act and make decisions going forward.

## Targeted Planning and Focus

In addition to the overarching umbrella of the broad vision, PGLs should lead their group in the development of a strategic business plan. We recognize that some firms or groups have become frustrated with annual business planning processes or feel that these plans are not worthwhile. This is often a function of flaws in the planning process itself. Oftentimes, PGLs do not understand how to achieve partner buy-in through the planning process – which is as important as the plan itself. Commit to a planning effort that will:

- Develop a shared view of the market which drives the need to move forward;
- Engage group members to own the goals and action steps so they are eager to implement the plan and effect change; and

- Execute flawlessly two or three priority goals.

You may wonder: Why just two or three priorities? Research shows that having more than 3 goals results in significantly less success. It is critical to the success of change initiatives that the practice groups focus and prioritize. This includes, as noted above, limiting goals. A laundry list of priorities that includes every concern may leave partners with warm-fuzzy feelings. But research shows that too many goals reduce the likelihood of achieving any of them. PGLs will get better results by getting partner buy-in to implement a smaller number of goals – with laser focus.

One of the most important elements to achieve high levels of group performance is common goals shared by group members. The planning process is often the best way to develop these. As you plan, answer these critical questions:

- Does the group need to improve its market position or brand?
- Does the group need to change its practice mix and move away from some types of less profitable work?
- Are any aspects of the group’s “business model” broken or need improving?
- Does the group need to recruit talent to replace rainmakers or knowledgeable senior lawyers who will be retiring in the next five years?
- Does the group need to enhance engagement of its members and develop greater cohesion in the group?

Even if your practice group members have soured on annual business planning processes, try again this year. In the midst of all of the uncertainty, clear, measurable goals could be just the answer to enhance group cohesion since they are even more important in these times. Setting and working toward measurable goals psychologically gives the group members a sense of control over something in their environment – at a time when it may seem like they don’t control anything.

## Ability to Inspire

It’s not enough to just come up with an inspiring vision. PGLs need to be psychologically savvy. They need to understand how to mobilize, motivate and otherwise move others to action. This requires emotional intelligence skills. The comfort zone for most lawyers is the skillful use of the intellect, which is certainly an asset in goal formation. But intellect alone is not enough. And mere rhetorical skills that may work well in the courtroom will not be sufficient to spur partners to take action in pursuit of a vision.

PGLs need to understand how to harness human emotions in three ways:

- Project authenticity: Actions and words should always match. This engenders trust and loyalty.
- Emphasize facetime: Whether meetings are in-person or remote, personal check-ins can still take place. These allow PGLs to mentor lawyers and address any concerns that may impede progress that supports change. Face time is even more critical when most of your professionals are still working remotely.
- Identify aspirational goals: With new challenges come new opportunities. PGLs can use the new vision to identify what may be possible in the future, setting goals accordingly.

## Ability to Experiment

No one will get inspired by a vision that consists of incremental efforts to continue the status quo. By definition, leaders in a time of change are trying to take control in a world where the lack of predictability makes complete control impossible.

Thus, PGLs must innovate, take risks and be willing to go in new directions. This means having the ability to make mistakes. There is, of course, no excuse for sloppy work. But in an environment where mistakes are not allowed, change efforts will perish.

While it can push a lawyer-leader outside of their comfort zone to be a change agent, the benefits, both individually and for the group, make it well worth the effort. We'll continue the discussion of the remaining five common characteristics next month in Part 2.

#### Authors:

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[1] Skepticism is not the only outlier trait that characterizes lawyers. The author's research also shows that the typical lawyer has a much higher than average tendency toward autonomy, urgency (impatience), and abstract reasoning (love of problem-solving and analytical thinking), and a much lower than average tendency toward sociability (lawyers are private and uncomfortable around relationship-based issues) and resilience (lawyers tend to be quite thin-skinned and defensive in the face of criticism or rejection.) All of these traits have the potential to undercut effective leadership as well as effective coping with change.

[2] E.g., to use an exaggerated example to make the point, if a low-resilience lawyer is criticized on a performance review, he might think to himself, "Wow, this is a terrible blow to my reputation. No one will give me any more work. I'll have to leave the firm. No other firm will hire me. Oh my god, I'll be unemployed. I don't have any other skill. I'll end up homeless . . ." By contrast, a high-resilience person might have a more "optimistic" set of thoughts: "Oh well. That criticism might have been warranted. It might be useful for me to hear what the critic's point is. Maybe I can learn some useful tips to improve my performance. Anyway, I've got a lot of other assignments that have gone well, so this one negative piece of feedback should be seen in perspective. And, I've been criticized before, and I recall that it hurts at the time but even two weeks later, it's just a distant memory. This too will pass." The latter thinking pattern has been shown to be found in naturally highly resilient people; and, those who adopt such a thinking pattern actually become more resilient.