

LETG Update

Summer 2011



A Word from the Chair

In response to overwhelming demand following our recent awards evening, this update contains the executive summaries of the winning and shortlisted submissions - in future, we will make these available on the night as we know members are keen to read the detail of the submissions straight away!

A major focus for the committee in the next few months will be our website. We are planning some significant developments that we hope will make the LETG even more accessible for members, (like me!) who are based outside London.

Some committee news: Shalini Sequeira and Victoria Johnston are standing down from the committee but we are delighted that they have both offered to stay involved and work on special projects. They have both made a fantastic contribution to the committee and will be missed. We would like to welcome John Squires to the committee who will be overseeing the improvements to our website. As ever, I would like to thank all our committee members for the time and effort they expend in making the LETG a really special example of knowledge sharing and collaboration.

What's coming up over the next few months?

Sept 2011 (date tbc)	Immerse Showcase, Adam Pacifico, Pacifico Partnership – SJ Berwin
11/10/11	Transaction Management Showcase Jamie Pennington, Pennington Hennessy – Shearman & Sterling
24/11/11	November Conference – BPP Booking form

Your LETG Committee

(In alphabetical order by surname)

David Ball
Dorothea Bannerman-Bruce
Liz Bryne
Trevor Comyn (Chair)
Joanne Gubbay (Vice Chair)
Pauline Holland (co-opted member)
Liz Ritter
Kathryn Rousin
Nigel Spencer
John Squires
Devbai Vekria (Treasurer)
John Worrall
Jane Cochrane (LETG Administrator)

Remember, you can email any of us via the “contact us” feature on the website or via the LETG group on LinkedIn

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LETG Awards and Networking Evening, 23 June 2011

The annual LETG Awards took place on 23 June, at Pewterers' Hall. As well as catching up with friends and colleagues, it also gave us the opportunity to find out what L&D teams have been doing within their individual firms and organisations. The winners and highly commended entries are listed below, together with the executive summaries.

The judges for this year's member awards were Giles Proctor from Kaplan Law School, Bernard George of Socrates Training and Joanne Gubbay from Ashurst. The provider awards were shortlisted by the LETG committee, and members voted electronically on their preferred entries. Congratulations to all the winners!

Best Programme for Lawyers

Highly commended: Hill Dickinson LLP - Solicitors' Accounts Rules training programme

Winner: DLA Piper UK LLP - Pricing and Profitability Programme

Best Programme for Business Services Staff

Highly commended: Mayer Brown International LLP - Essential Leadership Development programme

Winner: Clifford Chance LLP - Continuous Improvement Practitioner training

Best use of technology

Highly commended: Simmons & Simmons - Transaction Management and IT training programme for trainees

Winner: Linklaters LLP - Internal Faculty Programme

Best training idea by a provider

Highly commended: Rupert Vernalls, Business Information Ltd – The NEW 'Client & Sector Focused' - MBA Essentials for Lawyers

Winner: Sally Sanderson, Profex Consulting Ltd – Communications Programme

Best Programme for Lawyers

Highly commended: Hill Dickinson LLP - Solicitors' Accounts Rules training programme

The Solicitors' Accounts Rules training was developed at Hill Dickinson to provide all fee earners with knowledge of the updated rules and, in conjunction with this, to launch the Counsel and Experts fees ledger. The objective of the programme was to ensure that our lawyers were compliant with the new rules and to improve their working practices.

In designing the course we identified the need for all lawyers to be updated on the new rules introduced by the SRA in July 2008. We also wanted to raise the lawyers' awareness of the firm's breach count and the part they play in reducing the breaches, thus ensuring increased compliance from the firm.

The impact of the training has included a decrease in the number of breaches, decrease in audit fee, improved monitoring systems and better internal relationships between lawyers and the SAR team.

Winner: DLA Piper UK LLP- Pricing and Profitability Programme

DLA Piper's Pricing and Profitability Programme

Submission for LETG Award for best programme for lawyers 2011

The market for legal services is changing rapidly. There is significant downward pressure on fees, making competition for work increasingly intense. At the same time there is upward pressure on law firm costs, intensified by competition for the best talent.

DLA Piper is seeking to re-shape the nature of our client relationships, making them more collaborative, open and long-term. Alongside this, we are also seeking to raise our profitability. One way to achieve these two aims is by offering a greater range of pricing structures, and ensuring that all partners fully understand them.

"My own firm is seeing more and more clients demand to be paid on a fixed-fee "retainer" basis, or on a capped fee arrangement as opposed to the billable hour. Firstly, this establishes a collaborative culture based on trust where the right amount of time is taken for important business decisions, rather than a race against the clock in the interests of keeping a lid on costs."

Sir Nigel Knowles, Joint CEO DLA Piper, The Daily Telegraph, 25th October 2010

Best Programme for Business Services Staff

Highly commended: Mayer Brown International LLP - Essential Leadership Development programme

Mayer Brown International LLP, along with many other city law firms, experienced unprecedented change during the economic nosedive in 2008/9. This experience brought to light morale and retention issues amongst support staff including those responsible for managing people and challenging and motivating them. It emerged that many of the managers were being expected to manage without any regular or consistent training or development in the leadership or management of people.

In response to this, a two tiered development programme with additional, open courses and workshops, coaching and mentoring was designed. The "Junior Management Programme" and the "Essential Leadership Development Programme" were developed on a modular basis and delivered one day a month over a six month period. The programmes included the use of the MBTI profiling tool, action learning sets and coaching and mentoring as well as the more traditional training workshop approach.

Participants on both programmes, 40 to date, are supported and encouraged to:

- set their own personal and business objectives for the programme
- experiment with different influencing or management styles in a "safe" environment
- share experiences and coach one another during the sessions and in particular through Action Learning Sets
- chart their progress and emerge with an on-going action/development plan
- use the Myers Briggs Type Indicator to gain greater insight into their behavioural preferences, strengths, motivations and potential areas for development
- attend the Personal Effectiveness and Professional Skills range of workshops for ongoing development
- adopt and work towards exceeding the expectations for performance captured in the firm's competencies frameworks
- develop their coaching and mentoring capabilities to develop their staff

It was our hope that as a result of the new skills and confidence gained from the programmes, the managers would be able to help themselves and their teams to create a meaningful, challenging and motivating place to work where they could realise their own potential and a clear sense of purpose in their roles.

Knowing what we wanted from the programme helped us determine how we would measure our success. We asked individual participants to complete pre and post course work which involved goal and objective setting before each module and a review of agreed action plans and reflection during the subsequent modules and Action Learning Sets. These activities gave some good indicators of success at an individual level. We also used the traditional end-of-course feedback forms which were collected after each module to determine the levels of satisfaction of participants and areas for improvement of the modules. Coaching was made available for any participants that wished to follow up any development thoughts or needs and this was appreciated by those who took advantage of the resource.

We believe our programmes have been successful because we have seen greater retention of staff and a decline in the number of instances where performance management issues are typically being managed or handled by HR colleagues rather than by managers. It is not possible to attribute this completely to the programmes alone but we are aware of greater confidence in the abilities of those managers who have completed the programmes which lends itself to suggest there is a direct relationship between the development programme and the performance of the 40 managers of people who have been through the training and development provided. 2011 will provide a further marker when our first Employee Satisfaction Survey will be undertaken. This will give us additional insight as to whether we have moved the managers towards helping themselves and their teams to create a meaningful, challenging and motivating place to work where they could realise their own potential and a clear sense of purpose in their roles.

We are not complacent as we are constantly seeking to ensure that our programmes are current and challenging through the ongoing review and development of materials and programme content. The 2011 programmes have all been refreshed and updated to reflect the feedback received from previous cohorts and the changing priorities of the firm. We will no doubt make further changes once the results of the Employment Survey are known.

Winner: Clifford Chance LLP - Continuous Improvement Practitioner training

We developed this innovative training course as part of the Firm's broader continuous improvement initiative through which we look at opportunities to drive efficiencies in all areas of our business, in both legal and support areas. The 10 day training, which is externally accredited, teaches participants how to apply process improvement methodologies, based on the principles of "lean" and "six sigma", to optimise processes in the Firm. The application of these principles, while proven in manufacturing and service environments, is pioneering for the legal industry.

The training was designed to encourage immediate use of the knowledge acquired and to maximise return on investment for the Firm. The learning outcomes were reinforced by a requirement to run a project in parallel with the course and by regular coaching support. Thirteen participants, drawn from across our global network, completed the first wave of training. Their continuous improvement projects have already delivered results and preparations are under way for both their future projects and the next wave of training.

Best use of technology

Highly commended: Simmons & Simmons - Transaction Management and IT training programme for trainees

Transforming how our trainees learn to manage transactions and gain IT systems knowledge through an e-learning, business-focused simulation

Annually, approximately 40 trainee lawyers are recruited into the firm and undertake an induction programme which, historically, included standard, discrete programmes for formal IT training and a 'Transaction management' course - the latter introducing the trainees to core elements of managing their work, including matter opening, risk management checks and best practices in working with clients. We worked with our in-house e-learning team to transform and integrate these two programmes using innovative technologies into a business-focused M&A transaction simulation including bespoke e-learning programmes. This approach used technology in a creative way to give a much stronger business context to the IT training, enhanced the speed to effectiveness of the trainees and also generated significant ongoing cost savings for the firm in running the programme.

Winner: Linklaters LLP - Internal Faculty Programme

This submission relates to the Linklaters Law & Business School Internal Faculty Programme. Following a training needs analysis we decided to implement a blended learning solution to up-skill our internal faculty members. The programme comprised: bimonthly knowledge sharing sessions via virtual classrooms; E-Learning modules; blogs to share best-practice and a tailored train the trainer workshop. Due to the global nature of the faculty, the knowledge sharing sessions ran via virtual classrooms, using interactive features like whiteboard and polls to create a culture of sharing knowledge amongst our internal faculty. These sessions ran twice at different times to allow faculty members from all time zones to attend. Sessions were preceded by E-Learning modules to provide a basic level of knowledge. All elements of the programme were designed and delivered by internal faculty members. Thus, we produced no costs but provided a high quality blended learning programme to develop our global faculty.

Best training idea by a provider

Highly commended: Rupert Vernalls, Business Information Ltd – The NEW ‘Client & Sector Focused’ - MBA Essentials for Lawyers

To help lawyers understand their clients at a much deeper level, we have worked with numerous industry leaders, professionals and eminent academics to develop a new way of harnessing the core tools taught on MBA courses into short workshops, specifically aimed at lawyers.

To make the course even more valuable, we have recently added a **NEW** feature. Firms can now identify the specific clients/sectors they would like the workshops to focus on and provide us with details of these in advance of the course. This means workshops can incorporate real life examples, allowing client/sector teams to work together, applying the core MBA frameworks to:

1. Hone in on the critical factors for success within a client’s industry so that they can have more engaging conversations with their clients, ask them more substantive questions and talk to them on a level about their strategic options;
2. Identify the strategic logic that is driving their clients’ moves, enabling them to provide value added advice, finely tuned to client strategy; and
3. Develop broader client perspectives, allowing them to uncover new needs and spot additional opportunities for business development.

To ensure the concepts become practised firm-wide, in addition to running the course for their lawyers, firms are increasingly running the course for their non-lawyers.

Feedback has been so positive that the course is now being run on a regular basis by five of the top twenty UK law firms (in some of them in their international offices) and a leading US law firm. One top ten

Winner: Sally Sanderson, Profex Consulting Ltd – Communications Programme

In 2009 a new Chief Executive of a regional firm wanted to ensure that partners had the confidence and ability to communicate with their teams and individuals, particularly in uncertain times. A firmwide communications survey identified training and non-training needs. The ‘best training idea’ was to use this survey and set targets to focus resources and maximise the impact of a limited budget. Tough quantitative targets were set before delivering a modular skills programme. At key stages progress has been reviewed against these targets to focus in-house resources and ensure changes are embedded for the longer term. Innovative approaches minimised costs, embraced new technology, promoted cross-generational learning and helped partners/managers apply their skills to real situations. The firm is now half way through the targets period: some groups have already met most of them, people feel more aligned to business plans and satisfaction with communications has improved substantially to 78% with some groups improving by 30-50%

Cass Business School Research Update

Best Practice in Leadership Development in law firms

As some of you may be aware the LETG has recently commissioned a research project with Cass Business School to investigate how law firms ensure that leadership development for partners is driven from and connected to the firm's strategy. This research work goes beyond merely gathering data on the leadership development that firms provide: it aims to develop a real understanding of how effective the training and development is in equipping leaders/ partners to lead their firms into the future.

It is intended that the results will therefore provide insights about best practice in leadership development in law firms, and also some comparative benchmarking with other professions such as accounting, management consulting and investment banking. We are currently approaching a range of law firms (both member firms and non-member firms of the LETG) of varying sizes and types, and a smaller number of firms in other professions, to participate in the project.

The interviews (data collection) for the project are being scheduled through the early summer. Interviews will be conducted with Heads of Learning and Development or Heads of HR, and also either Senior Partner, Managing Partner or Practice/Group Heads in each of the firms we are inviting to participate. We would like to invite you to take part in the research and very much hope that you and/or your colleagues might be able to give some of your time to be interviewed. The interviews will last no longer than one hour. Your participation would be on a strictly confidential basis and participating firms can choose not to be identified.

The results of the research will be presented at the annual conference on 24th November 2011. We are very excited about the project and the insights into best practice that we expect it to deliver. We very much hope that you will take the opportunity to take part. If you are interested please contact Nigel.Spencer@simmons-simmons.com for further information.

Insights into L&D Success

Michael Farrell (deWinton-Williams) and Kathryn Rousin (Freshfields)

Many L&D departments have cutting edge learning, with return on investment targets and are recognised as talent drivers within their firms. Some, however, are not. In our experience working with many in the top 50, we have shared our ideas and seen what happens when L&D initiatives and lawyer engagement collide. What do the best do when this happens?

The best may not do all of the following but, put together, all of the following could create the best.

Link learning and development with success

Many firms have an ever decreasing ratio of development to fee delivery. Training is layered onto trainees, delivered to associates and fizzles out at partnership. If partners do not benefit from development, why would they see benefit for their associates? They happily pull people off training and even praise them for 'putting the client first'. The best have hard hitting partner programmes which focus on partner leadership behaviours, business management, personal growth and profile. These programmes are linked to tangible outcomes such as 360 ratings or growth of one's book of business. When partners see the benefit, they are more likely to advocate the value of learning for associates.

Create relevance and add value

You might get away with 'concept training' where people 'grow through the art of storytelling' in the public sector – it will not wash with world-weary and sometimes cynical lawyers. The top firms invest in researching the best of what is out there, seek leading edge training from other sectors and then tailor to ensure relevance to their lawyers. This requires investment in development time by providers – though beware of those who analyse your business on the daily fee rate only to give you an off-the-shelf course.

If ever a phrase has become hackneyed through over use it is "Added Value". Law firms agonise over their menu of added value items to coax the client into staying with the firm. But you can only add value if you know what the client needs and therefore values which cannot be satisfied by a tick box strategy. Similarly L&D cannot deliver added value until they know what their own clients value. Use the department business plans, ask the lawyers what they find difficult, focus on their personal and team objectives. Deliver solutions round these and then you will add value.

Insights into L&D success

1. Link learning and development with success
2. Create relevance and add value
3. Create challenge
4. Create focus
5. Drive action
6. Stand your ground
7. Use your suppliers

Create challenge

Staying fresh while delivering generic truths is always difficult but remember nobody finds what you say more fascinating than those who already agree with you. “But why develop those who already agree with you - they are probably doing it anyway?”

The reliance on happy sheets to justify training courses may be a hindrance which keeps defining training which does not deliver improved performance. It is well known that happy sheet scores are increased by factors other than value for money. These may be agreement with ideas, comfort with subject matter, liking for the facilitator, the level of humour, ease of sitting in the training room. All in all, the less people are really challenged to get out of their comfort zone, the happier their scores. No wonder so much training is regarded as ‘a useful reminder of good practice’ and damned with very faint praise.

The best firms position their training as challenging and difficult - something which will make people think like business people and not only lawyers. They stretch their lawyers and demand timely learning through various mechanisms from case studies to actor-led role plays. In short, tell a lawyer it is going to be relevant but tough. Then give them the confidence and skill to get it right and they will walk out feeling they have learned something of value and will therefore value the training.

Create focus

Sheep dip may appear to get you value for money and it certainly gets ticks in the L&D calendar. But does it deliver business results through people actually performing better? It is difficult to say.

Yes - some training just has to be sheep dip – especially when you need to get the basics across before putting in more challenging programmes at key career milestones. But why not focus training on need? If you have lawyers who are only ever going to be technical experts, why are you spending money on teaching them pitching skills when they are never going to attend a pitch? The progressive businesses are identifying business skills in their people and creating specific learning programmes to enhance those skills - BD programmes for known and potential rainmakers, people leadership programmes for potential and natural managers, CRM programmes for potential and natural client account managers. They will all need the basics in everything - but as senior associates they can specialise.

In addition we believe resource should be concentrated on talent. For example, deliver a bespoke training session to five senior associates designed specifically to deal with their business plan and you are set to get a return on investment that is specific, measurable and attainable. Deliver a general course to 15 and while your cost per capita is lower your return on investment will diminish. It always makes sense to invest heavily in your stars because you want them to stay and you want them to develop the business. Those who succeed love the challenge - so challenge.

Drive action

‘We have done something similar before. It’s like riding a bicycle – You never forget how to do it’. (Partner quoted in referring to a “man-management” course’ attended in the 90s). The belief that, once understood, so

called “soft skills” are rarely forgotten is a constant barrier. One of the greatest difficulties faced by lawyers is to practise the skills learned before they are forgotten. In a perfect world the skills are used immediately but the pressure of cost per capita means the delegates will always be a disparate group and while your unit cost goes down the return on investment can remain stubbornly low. So do you link your course content to targets?

The ultimate objective for the course is to enhance performance. Obviously, not all courses can be linked to defined results - but many can. The leading firms link training to measurable outcomes and set goals at the outset - management training should drive utilisation and a reduction of write-off, BD training should drive the number of ‘sales’ meetings and instructions, CRM should reduce debtor days, yes reduce debtor days. Your business service departments have data to help - use it and create advocates for your approach throughout the firm.

Stand your ground

In accountancy practices everything is put down to a value or cost. If accountants do not show up for training, the cost per head is calculated and recorded. Do your lawyers know or care how much of your budget they blow on a no show? Does it ever impact on them?

The leading firms now record and calculate no-show costs and the L&D departments drive these into statistics used for annual or bi-annual appraisals. In addition the figures are used when discussing the lawyer’s financial performance and in making L&D investment decisions. In one particular case, if the no-show figure is high enough this has an impact on bonus. In others the lawyer has to make up the missing CPD points out of their own pocket. We accept these approaches could cause difficult conversations but perhaps a hostile audience for your ideas is better than no audience.

Use your suppliers

Strategic partnerships are a long-held concept in B2B relationships. Consistency, reliability, willingness to invest and willingness to pay on time are just some of the elements of a two-way relationship. The exchange of ideas between a supplier who knows your firm, your business and the wider market and an L&D professional who knows where they want their lawyers to be in the next 5 years will generally deliver a very loud and resonating “bang for the L&D buck”.

The impact of a supplier who is willing to invest in the firm through research and good CRM practice including training L&D professionals to deliver courses and reduce consultancy spend will always make L&D look like business drivers. Encourage your suppliers to become part of or be an extension to the internal team. Challenge them to become the trusted advisor and become the “go-to” supplier for ideas.

deWinton-Williams Consulting Ltd delivers consulting and training services within the legal and financial sectors and are former winners of the LETG Training Organisation of the Year and Trainer of the Year. You can contact deWinton-Williams on 0207 372 4997 or through www.dewinton-williams.com

Qualified Lawyers Transfer Scheme What will the new Qualifying Lawyers Transfer Scheme mean for the profession?

Eileen Fry, Kaplan Law School

The Qualified Lawyers Transfer scheme (QLTS) was implemented on 1 September 2010 with assessments available from 2011. The QLTS provides qualified Lawyers, who are not solicitors in England and Wales, with a shorter alternative route to qualification to the domestic route. The Scheme replaces the Qualified Lawyers Transfer Test (QLTT) which had essentially remained unchanged since 1990. In 2009 over one in every four individuals who were admitted as a solicitor of England and Wales came via the QLTT route.

The Solicitors Regulation Authority (SRA) has appointed Kaplan as the sole provider of assessments under the QLTS for a period of three years so that Kaplan and the SRA can work closely together on the development of the assessments.

The Philosophy

The QLTS Assessments test applicants on the SRA's Day One Outcomes. The philosophy behind the Assessment is outcomes based. The QLTS Day One Outcomes are the competence standard to practise as a solicitor in England and Wales. There is no compulsory course to take the QLTS and no practise requirement.

All of this makes the QLTS a very high stakes exam. As a high stakes exam there are two absolutely key concepts that the assessment has to achieve, namely reliability and validity. To ensure reliability and validity the specification developed by the SRA for the exam drew on exam methodologies used in other professional exams in the UK (for instance doctors and dentists) and also by the National Conference of Bar Examiners in the US. This specification has been developed further by Kaplan.

Details of the Assessment

The assessment comprises 3 parts:

- an MCT (multiple choice test),
- an OSCE (objective structured clinical examination) and
- a TLST (technical legal skills test).

The MCT examines Part A of the SRA's Day One Outcomes. This is essentially the qualifying law degree/GDL together with some pervasive subjects.

The OSCE and the TLST examine Parts C, D and F of the SRA's Day One Outcomes. They both cover the three practice areas of business, civil and criminal litigation, and property/probate. The OSCE involves candidates conducting client interviews and completing attendance notes as well as advocacy/oral presentation exercises. The TLST involves candidates undertaking assessed exercises in on-line legal research, legal writing and legal drafting.

Meeting the SRA's statutory regulatory objectives - the interests of the consumer and the profession

The new Scheme is designed to help ensure the public and the solicitors' profession have confidence in the qualifications, knowledge and skills of all solicitors, however they have qualified. This is in line with the SRA's regulatory objectives set out in the Legal Services Act 2007. These new types of assessment and new methodologies facilitate this process so that both consumers and the profession should have this confidence. For instance the OSCE prioritises the interests and experience of consumers by concentrating on the client interview as the vehicle of assessment. On the other hand the profession set the pass mark for the MCT by use of the "Angoff" method whereby a standard setting group of solicitors is convened by the SRA to decide, based on the individual questions on the paper, what score differentiates somebody who can be considered to have just reached the standard of a newly qualified solicitor in England and Wales from somebody who has not reached this standard.

The Future

It will be interesting to see in the future whether these methodologies and assessments become more widely used in legal education in England and Wales.

What Makes the Perfect Pitch?

Gary Williams, The Pace Partnership LLP

As you read this hundreds of lawyers across the UK are currently working on presentations for new business pitches. They, along with their colleagues in marketing and business development, are investing thousands of pounds of time convincing new or existing clients to choose them for a piece of business. Will all this investment in time and money come to fruition? Sadly not.

Success rates for new business pitches vary enormously in the legal profession and we have heard firms quoting anything from 20% to 80%. So how do those in the 80% bracket achieve their success?

Be selective

It is tempting to go for every invitation to tender or request for proposal that comes your way. Many law firms believe that going for a large quantity will bring in some work eventually. In reality this isn't the case and makes the profitability of any work won very low.

Those firms that have a greater success rate at pitches and presentations tend to be more selective and only go for those opportunities where they have a strong footing. They describe a strong position as one where they have:

- Spent considerable time understanding the client – the key people, the client business and the industry or 'world' in which it operates.
- Understood the brief, not just what appears on paper but also all the motives and hidden agendas behind it.
- Gained access to the key decision-makers and 'influencers'.
- Identified the incumbent adviser and knowing their strengths and weaknesses.
- Tested their ideas and solutions with their client contacts so that they see them as much their ideas as the firm's.

Some law firms have even broken down these strengths into a series of benchmarks, against which they measure the invitations to tender (ITT) that come their way. If an ITT delivers a low score against these performance criteria, then it is gracefully declined. Firms adopting this approach have found that their pitch success-rate increases dramatically and the cost of winning new business becomes more profitable (as less time is wasted on unsuccessful bids).

Put yourself in pole position

Law firms who are more successful at pitches tend to have built a relationship with that client or prospective client, way before the ITT landed on their desk. In fact when it comes to winning clients, we would suggest only 20% of the effort should be devoted to the pitch itself. In our experience, the remaining 80% should focus on getting to know the client itself and this should have been set in motion months before. This means deciding about those clients your firm would really, really like to work with. It also means creating plans for those key prospects on how you will build relationships prior to an opportunity arising. This might actually bypass the need for a competitive pitch in selecting your firm. If it doesn't, your firm will be in pole position

when the tender takes place. Few of your competitors will be able to equal your breadth and depth of client knowledge in the time available.

Motivating the client to say yes

With a strong relationship established prior to the pitch, the proposal and presentation should be a final 'tick box' exercise to convince and reassure the client that your firm is the right one. That's not to play down the importance of this stage of the decision-making process. It is important. Some law firms, however, see it as the only way to win the client and fail to recognise how crucial a relationship-building phase is. The relationship-building phase guides the more successful firms on both what solution to offer and how it should be presented to motivate the decision-makers to say yes! It helps them to be very clear about the key messages they need to demonstrate in order to differentiate themselves from the competition.

Assembling your A team

It also causes them to assemble the best people for the team. By 'best' we mean the people who are most likely to engage with the personalities in the decision-making team. It doesn't mean picking people because they are available, or because they have a little knowledge of this type of business or work. Instead, it means really considering:

- Who, on the client side will be making the decision?
- What is their agenda, their interests, their motivations and behaviour style?
- Who we have in the firm who will best satisfy those agendas, interests and motivations?
- Who in the firm has the right personality to ensure our team comes across as the most compatible to work with and wows the audience?

Sometimes the team working on winning the work is wider than those representatives presenting on the day. The best firms pull on different strengths at different stages of the pitch preparation. This ensures that time, energy and skills are used to greatest effect.

Planning

Planning time is often seen as a luxury, but in fact time spent here can prevent valuable hours being wasted later. The best firms combine their knowledge of the client, the audience they are presenting to and the competition, to focus on the key messages they need to convey. A good way to do this is to consider how you would like the client to describe your firm in an exit interview after experiencing your presentation. What impression would you like them to gain? What benefits would you like them to recite?

It is unlikely in the time available that your firm is going to be able to convey many messages, so concentrate on the three key points you need to get across. These will give your presentation a clear structure.

Avoiding concentration dips

Planning for the day should involve putting some thought into how the pitch itself will run. When we consider human behaviour in presentations an interesting anomaly occurs. An audience's concentration tends to peak at the beginning and the end of the presentation. Conversely the bulk of most firm's content tends to be in the middle of a presentation, when concentration is at its lowest. The best firms recognise this and spend time

preparing high impact beginnings and endings to convey their main messages. To pull up concentration in the middle section they try a number of different tactics, for example:

- Asking questions that demonstrate your understanding and get the audience to think
- Signposting particular benefits
- Building in audience involvement
- Giving anecdotes or stories that bring a point to life
- Changing presenters for different points

To PowerPoint or not to PowerPoint?

Fewer law firms are using PowerPoint for their pitch presentations. Instead the more successful firms are finding alternative and creative ways to demonstrate their messages and understanding of the client. The more striking are those that show a passion to win this client. For example, in presenting its ideas to a major restaurant chain one firm summed up its key messages in the style of a menu card. Another firm summarised its key points in the style of travel documents when pitching to a major holiday company. Not only were these more interactive devices for the audience, they demonstrated these firms' genuine interest and freed the presenters to talk passionately about their solution without having to 'click through' list after list of bullet points.

And rehearse, rehearse and rehearse

Clients say that they love to see a firm passionate and enthusiastic to win their business. They want to feel that the firm really understands them and is eager to help them realise their goals or overcome their problems. It is difficult to convey such an impression without having confidence.

Confidence comes from understanding the client and their situation, it comes from your experience in this area of expertise and, on the day, it will come from the fact that the team has rehearsed and rehearsed and rehearsed its presentation. This doesn't just address what they are going to say, it also involves rehearsing how they are going to:

- Handover to each other
- Engage particular members of the audience
- Project their messages (in terms of voice, body language and visual aids)
- Respond to particular questions
- Leave and follow up the session

In the best firms we've seen, very little is left to chance. They try to plan and practice for every eventuality. So if you're currently staring at an ITT, consider how strong your chances are. If they aren't good, perhaps your energy would be better spent cultivating a relationship with another prospective client so that when they have a need, your firm is in pole position.

Summary

The firms that tend to win pitches are those that make it easy for the client to buy. They present the best solution in the commercial context and in a way that demonstrates enthusiasm for the client's business. This is difficult to accomplish in a typical pitch process timeframe. The best firms therefore turn time to their advantage by building relationships with the clients they want to win, long before a need is recognised and an

ITT formulated. When it does arrive these firms are ready and use their knowledge and experience of the client to put the best solution forward. In doing so they make sure that they:

- Assembled the best team to win this opportunity
- Decided what their key messages are and the impression they need to make
- Planned the presentation around the different agendas, motivations and interests in the client
- Structured the presentation to be impact-full throughout its duration
- Rehearsed and practiced every element
- Identified the follow up they need to conduct afterwards to maintain enthusiasm towards them

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