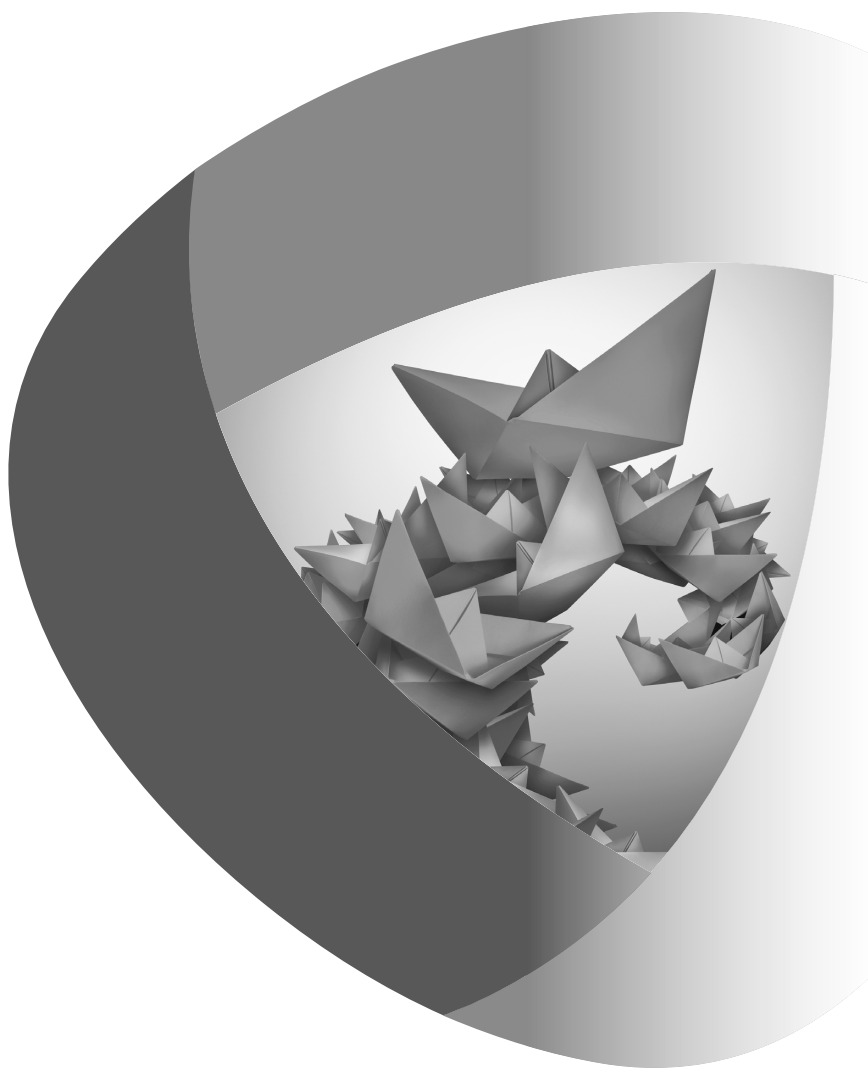


The Talent Management Toolkit for Law Firms



EDITED BY SOO DARCY

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Executive summary

The world of work is changing, and law firms are not exempt from the revolution. Today, satisfactory pay and the promise of partnership – somewhere down the line – are simply not enough to attract, retain, and motivate the very best legal talent. Increasingly, lawyers want flexibility, challenge, and variety in their work. Rather than seeing this as a threat, law firms that embrace the opportunity to reconsider their assumptions and approach work in new and innovative ways will lead the way into the future.

Talent management is not only critically important for law firms, it is also increasingly on the agenda of clients who take a greater interest than formerly in how their work is carried out, the makeup of their legal teams, and whether firms' compensation systems incentivize desired behaviors like efficiency, rather than simply rewarding hours billed or new business brought in.

This comprehensive handbook provides practical advice and guidance designed to help firms to recruit, retain, and develop the very best legal talent for the 21st century. With contributions from a wide variety of thought leaders from the legal and business consulting industries, it covers key issues for law firms today, such as diversity and inclusion, engagement, workplace culture, compensation design, and approaches to learning and development.

Part 1 of this book, Talent Management in the 21st Century, discusses the core skills and outlook needed by today's lawyers, and how law firms can seek to promote them. In the first chapter in this section, Jill King, consultant at Jill King Insights and former global HR director at Linklaters, discusses the changing nature of work and how firms and their staff can prepare for the "future normal". This is followed by a chapter from Rachel Brushfield, founder of EnergiseLegal and Energise – The Talent Liberation Company, who describes the essential skills lawyers need in today's changing legal market, such as leadership, the ability to manage and engage people, cultural awareness and

inclusiveness, and insights from the new sciences; all of these topics are built upon elsewhere in this “toolkit”.

With increasing pressure to do more with less, lawyers must be able to think innovatively in a legal world where client priorities are changing and new, potentially disruptive, technologies and business models are shaking up the profession. In the next chapter, Duncan Hart, director of Duncan Hart Consulting, describes the beliefs, attitude, and values which encourage “innovation thinking” and how to achieve strategic innovation and drive change in a law firm environment.

Finally in this section, Rebecca Normand-Hochman, partner at Venturis Consulting Group, provides guidance on aligning talent management and firm strategies to support attracting and retaining the best talent.

They say that “culture eats strategy for breakfast”. In acknowledgement of this home truth, Part 2 of this book, *Engagement and Culture*, describes how cultural changes can drive collaboration, communication, and efficiency, and provides advice on how to “sell” those changes to the firm as a whole.

In the first chapter in this section Emerson Csorba, president of Csorba & Company Ltd., and director of Gen Y Inc. Eric Termuende, provide recommendations for leaders in the legal sector to help them take advantage of a growing millennial workforce, based on interviews with young lawyers across the UK, US, and Canada.

The business case for diversity – whether of age, ethnicity, or gender – is well established. More diverse teams are proven to perform better, and increasingly clients expect law firms to be able to offer diverse perspectives. In the next chapter, Lisa B. Horowitz, founder and principal advisor of the Attorney Talent Strategy Group LLC, describes how a strategy that *intentionally* aligns and integrates efforts to advance inclusiveness and embeds them into the fabric of the firm through the TM function will facilitate a firm’s ability to effectively and efficiently leverage the diverse talents of all its attorneys.

The benefits of cross-selling are myriad but may not necessarily be as evident to individual partners as they seem to the leadership. Expert advice is provided here from renowned business development coach David H. Freeman, who describes how to overcome typical barriers in order to make cross-selling a pillar of the firm’s culture and promote growth across the firm.

As the author of the final chapter in Part 2 notes, many firms see their support functions merely as “cost centers to be tolerated”, and

often even the teams themselves do not recognize their true potential to make a valuable firm-wide contribution. Knowledge management leader and law firm consultant V. Mary Abraham, co-founder of Broadli Inc., describes how this potential can be realized, and specifically the role of good leadership in driving innovation, communication, and profitability.

How do you measure the performance of your people? What are your key performance indicators, and how do you reward these in a way that will be seen as fair and equitable by all? This important topic is discussed in Part 3 of this book, Performance and Reward.

The first chapter in this section, co-authored by Peter Scott, founder of Peter Scott Consulting, and Richard Wyatt, finance director at Greenwoods Solicitors LLP and owner of Cambridge Blue Square Management, shows how performance assessment and management techniques can give firms the tools they need to keep lawyers happy – and to stop talent walking out the door. The topic of compensation as a powerful driver for behavior is then continued by Joel A. Rose, president of Joel A. Rose & Associates Inc., who provides guidance on identifying criteria for determining partner compensation, and ensuring that partners are clear about, and on-board with, how their contributions are evaluated and rewarded.

The next chapter then looks more specifically at the vexed question of origination credit and the challenges that, in particular, women lawyers face in receiving their due for the work they bring in. Marianne Trost, The Women Lawyers Coach, discusses how women should approach often inflexible origination systems.

Of course, money is only one of the “rewards” that serve to motivate staff, and according to the authors of the next chapter, it is not necessarily the most effective – especially when it comes to the millennial generation. Dr Bob Murray and Dr Alicia Fortinberry, co-founders and principals of Fortinberry Murray, describe how verbal relational rewards (such as praise or recognition) and also the chance to learn something new (social rewards) can be extremely effective at reinforcing behavioral change – more so than material rewards.

As the first four chapters in this section show, there is more than one way to compensate and incentivize desired behaviors, and different systems will suit different firms. But, turning this on its head, how do you deal with *unwanted* behaviors and *failure* to perform? In the final chapter in this section, Nick Jarrett-Kerr, principal of Edge International, describes three essential infrastructure elements that will help firms address this problem area.

The fourth and final part of this book looks at career development, opening with a chapter from Norman Letalik, former partner and managing director of professional excellence at Borden Ladner Gervais LLP (now general counsel and corporate secretary at Volkswagen Group Canada Inc.), who discusses the “new normal” in legal education and the role of knowledge management in developing talent.

While partnership is no longer the brass ring that it once was, it is still the ambition of many young lawyers. In the next chapter, Mike Mister, partner in Moller PSF Group, and Rob Lees, consultant to PSF leaders worldwide, look at the stages a partner passes through – from establishing their practice through to “life after partnership” – and explain why understanding these phases is key to improving partners’ contributions to your law firm at each step of their career.

The book concludes with two case studies that provide some insight into what firms today are doing to foster the personal and professional growth of their partners and staff. The first focuses on professional development, and in particular the role of mentoring, at Blake, Cassels & Graydon LLP. The second explores Baker & McKenzie’s approach to personnel management, the current initiatives that have seen the global firm widely recognized as being among the world’s most innovative professional services firms, and the steps the firm is taking to ensure that its people continue to define and drive its culture and working practices.

About the authors

V. Mary Abraham is a knowledge management leader and law firm consultant. In 2013 she co-founded a digital startup, Broadli Inc., which created the Broadli generosity app. She has also built a practice facilitating strategic conversations and interactive educational sessions for a variety of for-profit and non-profit organizations. Active in the legal industry for over 23 years, she practiced corporate law at a top-tier international firm and helped lead its knowledge management efforts.

Mary has served on the advisory boards of the Practical Law Company and KMers.org (an online forum for knowledge management personnel worldwide), and was a member of the conference planning committee for the International Legal Technology Association from 2009 to 2012. In 2013 she joined the faculty of Columbia University's Master of Science in Information and Knowledge Strategy program. She is a frequent speaker and writer on knowledge management, technology, and social media issues. Mary contributes to the Law Technology Today column sponsored by the American Bar Association's Law Practice Management Section and her blog *AboveandBeyondKM.com* continues to win commendations and readers.

Bradley E. Berg is a partner and the practice group leader of the litigation group at the Toronto office of Blake, Cassels & Graydon LLP. Brad's practice includes both complex commercial cases and precedent-setting public interest litigation. He has appeared as lead counsel at all levels of courts, including the Supreme Court of Canada, and before international commercial arbitration panels, administrative tribunals, and inquests. His trial and appellate experience in commercial and civil litigation includes business disputes, class actions, mining, banking, real estate, and leasing, taxation, injunctions, the regulation of professionals, constitutional and administrative law, and all types of contract and negligence actions.

Brad has acted on shareholder disputes, directors' and officers' actions and arrangements. He is regularly consulted on corporate transactions

and opinions, and frequently advises on complex questions of legal privilege, jurisdiction, and cross-border regulation.

Rachel Brushfield is the founder of EnergiseLegal and is a “talent liberator”; a career, talent, learning and development strategist and coach, and a published author. She has over 29 years of experience helping the legal profession embrace change. Her career background is in fast moving consumer goods (FMCG) marketing and brand strategy and integrated communications, both employed and on a consultancy basis for design, advertising, and innovation consultancies. Rachel now enjoys a portfolio career: career and executive coaching, business development mentoring, talent management, and L&D/innovation consultancy and mentoring, events, and content curation and creation. Rachel is also trained in action learning sets (group coaching).

Entrepreneurial in nature, and incisive, insightful, strategic yet practical and down to earth in approach, she keeps ahead of trends and up to date with best practice, and has focused on the legal profession for over nine years. Her published material includes a book on talent management for lawyers (2012), professional development for lawyers (2012), and over 18 articles for high quality legal magazines including *Managing Partner*. Rachel has contributed chapters on “women in law and gender balance” (in *Managing talent for success*, The International Bar Association, 2013), and on the “impact of mentoring and coaching on life balance issues” (2014).

Rachel has done two events for the Association of Women Solicitors (AWS) London group on personal branding and social media and on marketing yourself, and she initiated and planned an event on portfolio careers for the women lawyers division (WLD) of The Law Society in 2014, as well as many for various associations and organizations about self-marketing, talent management, personal branding, career planning, and employee engagement.

Emerson Csorba works with clients across the UK, United States, and Canada in higher education, public, and private sectors, and on issues related to cross-generational engagement, people development, and the cultivation of self in a hyper-connected world. Previously, he co-founded and helped lead Gen Y Inc., a consultancy with clients in Edmonton, Calgary, Vancouver, Ottawa, and London, England, ranging from multi-nationals to universities/colleges and large non-profits, in sectors such as agriculture, forestry, heavy materials/oil and gas, and clean tech.

Emerson read for a MPhil in Politics, Development, and Democratic Education (Distinction) at the University of Cambridge, Pembroke College. While at Cambridge, he was on the executive team of Silicon Valley Comes to the UK (SVC2UK) and Cambridge University Entrepreneurs. Previous to this, he was a Peter Loughheed Leadership Scholar at the University of Alberta. He will soon begin a DPhil at the University of Oxford, focusing on questions related to the changing relationship between employers and employees in the workforce, working with leaders from The Centre on Skills, Knowledge and Organisational Performance (SKOPE).

Emerson is an active contributor to the *Harvard Business Review*, the *Telegraph*, the *World Economic Forum Agenda*, and the *Globe & Mail*, and is a World Economic Forum Global Shaper. In 2014, he was a *Globe & Mail* Notable Canadian, and in 2014 was named by Ashoka/American Express as one of North America's 45 Emerging Innovators Under 30. He is an *Avenue Magazine* Top 40 Under 40 recipient, as well as fellow of the Royal Society of Arts in London, England. He splits his time between Canada and the UK.

Alicia Fortinberry, PhD (Organizational Psychology) has gained international recognition over two decades for her powerful, lasting impact on organizations and leaders globally. Alicia enables organizations to build the leadership, performance, and culture that will achieve their vision and strategy. In addition to her work as a consultant, facilitator, and high-level executive coach, Alicia is a best-selling author and keynote speaker. She combines a clear, engaging, and practical communication style with a proven evidence-based approach and strategic acumen.

With her highly experienced and credentialed Fortinberry Murray team, Alicia works with organizations and governments globally to help leaders shape and implement winning strategies using research-based understanding of human motivation and change.

With her colleague Dr Bob Murray, Alicia won the American Science Achievement Award (2012) and has been appointed to head the US government's comprehensive national work stress initiative. Alicia's pioneering work is backed by the latest research in neuroscience, genetics, and management. Together with Bob, she has presented her work at leading universities such as Duke, Tufts, California State, and Sydney University.

High-level global clients include professional and financial services firms such as Deloitte, KPMG, PwC, Macquarie, Westpac, Allens Linklaters, Clayton Utz, and Herbert Smith Freehills, as well as

companies such as Stockland, Wesfarmers, Westpac, BHP, Macdonald's, PepsiCo, and Ford.

With Bob she authored the international best-selling books *Creating Optimism*, *Raising an Optimistic Child* (both McGraw-Hill), which have become standards in the fields of optimism and resilience. Most recently Alica and Bob published *Leading the Future: The Human Science of Law Firm Strategy and Leadership* (ARK Group, 2016).

Alicia received her Masters in Psychology and Journalism from Columbia University and her PhD in Organizational Psychology from the University of Phoenix. She is a member of the American Psychological Association, the American Association for the Advancement of Science, and the American Society of Journalists and Authors.

David H. Freeman, JD is a former practicing lawyer, the award-winning CEO of the David Freeman Consulting Group, and founder of Law Firm CultureShift®. He is a best-selling author, speaker, consultant, and coach who has shown thousands of lawyers and professionals how to become more effective leaders and rainmakers.

For three consecutive years, David was recognized nationally as the top "Law Firm Business Development Consultant and Coach" in *National Law Journal* surveys, and for over 20 years he has worked with hundreds of law firms worldwide, including over one-third of the AmLaw 200. He is the author of four books: *The Law Firm Leader's Reference Guide for Creating a Business Development Culture*; *Secrets of the Masters: The Business Development Guide for Lawyers*; *Weekly Reminders for Revenue-Focused Leaders*; and *Creating a Cross-Serving CultureShift: Mastering Cross-selling for Lawyers and Leaders*.

David is a highly rated speaker, trainer, and consultant, and his expertise has been recognized through appointments as an elected fellow in the College of Law Practice Management, and as the exclusive business development coach for the Women in Law Empowerment Forum (WILEF). He also brings a deep understanding of how to engage the organizational and human factors that drive successful implementation based on several years as a change management, strategic planning, and balanced scorecard consultant for mid-sized and large corporations. He brings all of his expertise together in his proprietary Law Firm CultureShift® process, a whole firm methodology that dramatically increases client and revenue-focused activity throughout a firm. He can be reached at 949-715-0819 or David@LawFirmCultureShift.com.

Duncan Hart practiced as a barrister and solicitor for over 20 years before becoming the regional managing director of one of Australasia's largest firms with over 2,000 employees. He became a full-time consultant in 2002. His various consultancies have taken him from Silicon Valley to Shanghai, and his clients include not only law firms, but a wide cross-section of industry groups, including manufacturing, health, education, and IT.

Duncan's first book, *The Strategic Law Firm* (Ark Group, 2010), argued the case for a more strategic approach to law firm management, and in particular the adoption of the types of strategic planning tools and methodologies that he had seen in operation in many of his clients' industry sectors.

More recently, his background in intellectual property has led him to explore more closely the role of disruptive technologies and business models in various sectors, including law, patent attorney, and other professions. Many of his recent assignments involve the so called "start-up" sector, and larger more mature industries where clients are seeking to develop innovation-based strategies in fields as diverse as bio-tech and logistics. Duncan's second book, *Lean Innovation for Lawyers: Creating and Delivering an Innovation Strategy* (ARK Group, 2015), describes how firms can create and deliver an innovation agenda to deliver value for clients, and to improve their own competitive position and profitability.

In all his assignments, Duncan draws from a rich palette of industry and professional experience, and he is committed to the belief that law firms, like any other businesses, have much to learn from other sectors, particularly in the area of innovation-based strategy. In short, they should be encouraged to experiment to find new, and hopefully better, solutions for both the firm and their clients.

Lisa B. Horowitz, JD, MSOD, is the founder and principal advisor of the Attorney Talent Strategy Group. Lisa spent almost 30 years as a partner, associate, counsel, and senior talent development professional in AmLaw 100 law firms. She currently shares her experiences coaching attorneys on achieving their career goals and advising law firms and legal departments on the design and implementation of strategic talent development strategies and solutions. For additional resources, see www.atalentstrategy.com or contact Lisa at lbhorowitz@gmail.com.

Nick Jarrett-Kerr LLB is a specialist adviser to law firms and professional services firms world-wide on issues of strategy, governance, and leadership development as well as all important business issues facing

firms as they compete in difficult market conditions. Nick is a member of Edge International, a leading global consultancy to law firms. In the last 12 years, he has established himself as one of the leading UK and international advisers to law firms. He has been involved full-time in professional service firm management for over 20 years.

He is a regular writer and speaker on management and leadership topics with an emphasis on strategic and business planning, as well as issues of governance and structure, partner compensation, and strategy execution. Prior to becoming a consultant, Nick (who is a UK solicitor by training) was for eight years the chief executive partner of Bevan Ashford, a leading regional firm in Great Britain, during a period of enormous growth starting in the depths of the 1989–1992 recession.

In the last few years, he has consulted to firms in more than 20 countries on four different continents on issues relating to strategy, governance, mergers, equity/ownership structures, partner performance, succession issues, profit sharing and other business-critical matters.

Nick is the author of *Law Firm Strategy: After the Legal Services Act* (2009) and *Tackling Partner Underperformance in Law Firms* (2011). Nick had a regular monthly column in the *Managing Partner* magazine, writing on matters in the front of the minds of managing partners. Much of Nick's written work is available on his website and blog at www.jarrett-kerr.com. Nick is currently visiting professor at Nottingham Trent University where he leads the strategy modules for the Nottingham Law School MBA strategy modules.

Jill King is a human resources (HR) specialist, business writer, and consultant who spent over 20 years working in the professional services sector. As a leading HR professional, Jill has experience in the fast-moving consumer goods, retailing, engineering, accountancy, and legal sectors. She has led regional and global HR, learning and development, and knowledge, and communication teams as the HR director at KPMG, at Hogan Lovells (formerly Lovell White Durrant), and most recently at Linklaters. She now focuses on her writing and consulting services.

Rob Lees is the co-author, with Harvard Business School professors Tom DeLong and Jack Gabarro, of the best-selling *When Professionals Have To Lead: A New Model For High Performance*. He is also co-author of the HBR article, *Why Mentoring Matters in a Hypercompetitive World*. Rob also co-authored, with August Aquila, *Engaging Partners in the Firm's Future* and *What Successful Managing Partners Do*. He has also

published numerous articles on professional service firm strategy in both the US and UK.

Rob created, with Jack and Tom and Liz Baltesz, the 360 Leadership Questionnaire based on the leadership model in *When Professionals Have to Lead*. A recent analysis of the 360 responses yielded significant insights on the perceptions of women as leaders, which has major implications for the acceleration of women into senior positions in professional firms.

Before retiring last year, after 25 years working with leading professional firms across the world, Rob had spent the last 10 years consulting with firm leaders on how to improve their strategic position and, critically, how to deliver it. During this time, Rob also helped set up Møller Professional Service Firm Group, the UK's leading PSF consulting firm on improving individual, team, and firm capability.

Rob had several notable positions prior to moving into consulting, including global head of human resources at EY Global (formerly Ernst & Young) and head of EY's global leadership institute in Cambridge, Mass. He was also head of professional development in EY's UK firm and global head of professional development at Morgan Stanley.

Rob currently collaborates on selected research projects and writes on issues relating to firm strategy and performance. He can be contacted at roblees2@sky.com.

Norman Letalik is the general counsel and corporate secretary for Volkswagen Group Canada Inc., where he is responsible for legal and regulatory matters. Previously, he was a partner and the managing director, professional excellence at Borden Ladner Gervais LLP, Canada's largest law firm. He practiced as a litigator, primarily in product liability and class action defense and marine law. He also headed BLG's Automotive Focus Group.

Prior to entering law practice, Norman was a law professor at Dalhousie University and the National University of Singapore. He has been a barrister and solicitor in Ontario since 1989 and was called to the Rolls as a solicitor of the Law Society of England & Wales in 1998.

He is a fellow in the College of Law Practice Management

Mike Mister leads the Leadership Practice Group at the Møller PSF Group – one of the largest providers of specialist consulting advice to professional service firms worldwide. In addition to consulting and leading a variety of workshops and programs around the world, Mike has authored a number of case studies including the Harvard Business

School case #N9- 514- 010 “Ellen Harvey”; “The New Partner”, and “Project Pat – What is the Point of Me” with colleagues at Møller PSF Group. In addition, he has co-authored “Making Centralization and Agility a Reality”; “Learning to be the Best”; “The 4 Stages of a Partner’s Career” with Rob Lees. Apart from leadership studies, his other main interest is working with partners to help them successfully transition out of their firms and to enter the next phase of their careers, whether that be into retirement or other roles.

Prior to joining the Møller PSF Group, Mike spent over 20 years working internationally with EY Global (formerly Ernst & Young). His last role was that of global director for executive development which, although based in London, necessitated extensive travel to work with partner and leadership teams in their practices around the world.

Mike’s current interests are at the intersection of firm strategy with the people agenda – he is currently working on a practical leadership handbook for the professional service sector. Mike can be contacted at Mike.Mister@mollersfg.com

Bob Murray, MBA, PhD (Clinical Psychology), is an internationally recognized expert in strategy, leadership, human personality, and behavioral change. Distinguished for his ability to uncover the core of issues, Bob has developed ground-breaking methods for measuring, benchmarking, and improving an organization’s capacity for change and adaptation.

Bob’s insights are based on his wide experience and also on his deep knowledge of research in the areas of management, psychology, genetics, and neurobiology. Clients include premier law firms such as Allens Linklaters, Ashurst, and Herbert Smith Freehills; and other top tier companies such as KPMG, Macquarie Bank, PwC, Ford, Caterpillar, McDonald’s, PepsiCo, BHP, Wesfarmers, and Stockland.

Bob is an acclaimed keynote speaker and is widely published. With Dr Alicia Fortinberry, Bob received the American Science Achievement Award (2012) and advises the US government on workplace stress and other workplace issues. He specializes in ensuring executive teams develop and drive strategies that will be embraced and actioned.

Bob’s previous experience includes working for Hill Samuel Merchant Bank, where he helped to turn around distressed companies, as well working as a BBC producer. With Alicia, he authored the best-selling books *Creating Optimism* and *Raising an Optimistic Child* (McGraw-Hill). These international best-sellers have become standards in the fields of optimism and resilience.

Bob has lectured at Sydney, Duke, Tufts, South Florida, and California State universities. He received his MBA from Sydney University (where he also earned his MA in Psychology) and his PhD from New York University.

Bob is a member of the American Psychological Association, the American Association for the Advancement of Science, and the American Society of Journalists and Authors.

Rebecca Normand-Hochman is a partner of Venturis Consulting Group and heads the Paris practice. Her work focuses primarily on talent acquisition and integration strategies in international law firms, especially in Paris and London. Of Franco-British heritage, Rebecca practiced finance law in Allen & Overy's Paris office which has laid the foundations of her present work in talent.

Rebecca has carried out extensive research on law firm talent management and her work draws from the best practices as well as from her collaboration with leading experts in leadership, mentoring, and change management.

Rebecca is the founder and a director of the Institute of Mentoring which provides insight, research and publications to advance mentoring best practices in the legal profession. She is an officer and advisory board member of the International Bar association (Law Firm Management Committee) and chairs the Talent and Leadership Working Group. She is also a consulting editor on behalf of the International Bar Association.

Joel A. Rose is a certified management consultant and president of Joel A. Rose & Associates, Inc., management consultants to the legal profession. The firm, national in scope, is headquartered in Cherry Hill, New Jersey.

Joel received a BS from New York University and an MBA from the Wharton Graduate School of Business, University of Pennsylvania. He has extensive experience consulting with private law firms and government agencies. He performs and directs consulting assignments in law firm management and organization, strategic and financial planning, lawyer compensation, the feasibility of mergers and acquisitions, and marketing of legal services. He has extensive experience planning and conducting retreats and special expertise resolving problems among and between lawyers.

Joel's articles on law office management and economics appear in the *Philadelphia Legal Intelligencer*, the *Pennsylvania Law Weekly*, the *New Jersey Law Journal*, *The Texas Lawyer*, publications of the Association of Legal Administrators, and other state and local bar association journals. He is the principal contributor to *Thrive*, the blog of the Law Practice Management of the New York State Bar Association.

Joel is a contributing author of the book *Model Partnership Agreements for New York Law Firms*, published by the New York State Bar Association, and author of chapters in the monographs, *The Quality Pursuit: Assuring Standards in the Practice of Law*, and *The Professional Managers in the Law Office*, both published by the American Bar Association. He is on the board of editors of *Accounting and Financial Planning for Law Firms* and *Law Firm Partnership and Benefits Report*. He is a member of the Law Practice Committee of the American Bar Association.

Joel frequently presents tele-seminars and webinars for the American Bar Association, The New York State Bar Association, The New Jersey Institute of Continuing Legal Education, The Pennsylvania Bar Institute, The American Law Institute, ClearLaw, and national and international law firm networks. He speaks at national, state, and city bar association meetings and at chapter meetings of the Association of Legal Administrators. He is a member of the Law Practice Compensation of the New York State Bar Association, an associate member of the American Bar Association, and a fellow in the College of Law Practice Management. Joel is listed in the US edition of *Who's Who*.

Peter Scott was for eight years until 2000 the Managing Partner of Eversheds London and European offices. He acts as an advisor, trainer, and coach to many law firms and other professional firms in the UK and abroad in relation to their financial, strategic, people, and risk/compliance management issues, with particular focus on helping clients to improve their competitiveness through effective performance management. One of the roles he is most often asked to carry out for clients is to act as a 'discreet mentor' to managing partners and CEOs.

Peter is editor of *Practice Management Handbook* (Law Society Publishing) now in its 2nd edition and a member of the editorial board of *Legal Compliance Bulletin* published by the Law Society. He is a frequent speaker at conferences for lawyers and other professionals and his articles are published in a number of well-known legal and other professional journals.

Peter is a solicitor (non-practicing) and a consultant with Laura Devine Solicitors, a leading niche immigration law firm.

Marianne Trost is The Women Lawyers Coach. A nationally recognized trainer and coach, inspirational speaker, and internationally published columnist, Marianne works exclusively with women attorneys to help them to succeed in business development and to create

self-determination in their careers. Marianne is an expert on “the business of the practice of law”. Distinguished as one of the first in-house law firm attorney training professionals in the US, Marianne created an AmLaw 100 in-house associate training program that was voted number one in *The American Lawyer*.

Marianne’s mission is to guide, teach, and inspire women lawyers globally to grow their own books of business and manage their careers strategically. She conducts business development workshops, small group training sessions, and one-on-one coaching for lawyers, and is launching a line of business development self-study products to enable women lawyers throughout the world to access the information and training they need to succeed in business development.

Known for her hands-on skills workshops, practical tips, and “how to” approach, Marianne has presented at Women Legal, DRI Women in the Law, DRI Diversity for Success, the Defense Association of New York, the Women Lawyers Association of Los Angeles, the San Diego Lawyers Club, law firm women’s initiative programs, and at numerous bar associations, law schools, and legal organizations. She is a former co-chair of the National Association of Women Lawyers Survey Committee on the Retention and Promotion of Women in Law Firms and a former columnist for *Women Legal* magazine. For more information, see www.thewomenlawyerscoach.com.

Eric Termuende is co-founder and director of Gen Y Inc. and manages the company’s Calgary office. In addition to leading client-facing roles, Eric oversees Gen Y Inc.’s “Emerging Talent Network” portfolio, where he is building Canada’s largest and most impactful emerging talent network.

Eric is community integration chair for Global Shapers Calgary, a community that functions under the World Economic Forum. Eric also sits on the Leadership Committee for the Canadian G20 Entrepreneurship Delegation, and is a founding member of the Haskayne Alumni Advisory Council. A former World Entrepreneurship Forum Delegate, University of Calgary SU Vice President, Class Ambassador (2014), and youngest Ditchley Foundation attendee, Eric has worked and spoken in numerous places across the world over the past years both personally and professionally.

Eric was recently named as Calgary’s youngest Game Changer by *BRANDED* magazine and has spoken and written for the Conference Board of Canada and the *Globe & Mail*, respectively. Eric recently

returned from Cambridge and Oxford attending the 800th Anniversary Conference of the Magna Carta and the future of democracy and served as a guest lecturer for young leaders delegation from Shanghai at the Judge Business School and Centre for Entrepreneurial Learning Cambridge, England.

Richard Wyatt is a finance director at Greenwoods Solicitors LLP and owner of Cambridge Blue Square Management. He has been involved in law firm finance for over 30 years and has developed those firms through mergers, IT development, and culture change. He ensures that his firms are leaders of their profession.

Richard's expertise is widely recognized and he is often in demand to speak at conferences on law firm finance and management. As well as his professional interest in law firm strategy, finance, and IT, he also believes in developing people to ensure they maximize their potential. In addition to his law firm finance roles, he is a pension scheme trustee.

When he is not working, he is playing and coaching cricket. He also plays tennis regularly and golf occasionally.