

Coach Like a Pro

To improve associate retention, more firms should take a page from corporate America's playbook.

By Joan Newman

COACHING HAS BEEN USED IN THE corporate world for years, but it is relatively new to the legal profession. Nonetheless, it already shows promise as a tool in addressing one of the major challenges facing law firms—preparing the next generation of leaders to fill management and client relationship positions soon to be vacated by retiring baby boomers. Coaching can be used for many purposes, including honing management skills in firm leaders. But most often it is tied to associate training—teaching basic personal skills to new hires and developing professional and leadership skills in more senior associates.

Coaching is not the same as mentoring. Mentoring programs are geared toward sharing knowledge and skills in a particular area of expertise. A fully developed coaching program goes beyond mentoring to include personal, substantive, leadership, and professional skills. Because coaching is targeted to meet individual needs, it is a highly effective means of improving associates' performance, motivation, and firm loyalty.

These are the steps to build an effective coaching program at your firm:

■ **Make the commitment.** Does your firm fully support and value the training and development of its associates? Does it recognize the importance of coaching in a competitive marketplace? For its program to succeed, a firm must commit to the expense of establishing and maintaining the program. That expense includes associate and partner time and effort. The coaching process should be seen as an investment in associate development—a perk, rather than a remedial effort to fix suboptimal performance.

MANAGEMENT

■ **Examine your associate evaluations.** At most firms, evaluations focus on associates' skills and partnership prospects. But associates often report that their evaluations are not substantial or detailed enough, and even when they are, firms may not offer the support or training that associates need to improve their skills. A meaningful evaluation program must be based on competency: establishing which skills, capabilities, and experiences associates need at each stage of their careers, communicating that information to associates, and evaluating associates against specific benchmarks. Coaching is not a one-size-fits-all process: Only when evaluations are structured this way can coaching effectively address each associate's specific needs.

■ **Make strong matches.** Selecting the right partner to coach an associate involves determining whether the partner excels in the areas that the associate needs (and wants) to improve or develop in, and whether the partner has the interpersonal skills needed to be an effective coach. It is not enough for the partner to excel in the substantive areas. He must also be other-directed—interested in helping others succeed, and willing to commit time and effort to support the associate's growth. Further, the partner must possess emotional intelligence (self-awareness, the ability to empathize, and good interpersonal skills); excellent skills in listening, problem solving, and feedback; and the ability to confront and challenge the associate.

I'm sometimes asked whether the partner should be in the same practice group as the associate. There's no right answer—it's a judgment that is best made on a case-by-case basis. If the partner and the associate come from different practice groups, the associate may be more honest and direct in communicating with the partner. On the other hand, a coaching partner from within the associate's practice group may have a better understanding of the demands and dynamics of that group.

It is not always necessary that the partner and the associate have similar personalities and common interests, experiences, and backgrounds. Although it might be easier to build rapport if they share these common traits, what matters most is that they are compatible enough to establish a relationship built on trust and mutual respect.

Implementing the coaching process begins with a joint assessment. Later, participants will set goals and objectives, develop action steps and deadlines, and, finally, measure and evaluate prog-

ress. Initially, the partner and associate should have open and direct discussions about the skills that the associate needs to improve or develop. The partner might ask the following questions. Along with the associate's evaluations, the answers to these questions can be used to determine which skill or behavior should be coached, assess the associate's commitment to the process, develop an action plan, and establish a procedure to evaluate and maintain the new skill or behavior.

- What do you want to improve or change?
- What is your level of competency for the skill you want to improve?
- How do you think others perceive you or your skill level?
- How would you benefit, or what would be different for you, if you could improve the skill?
- On a scale of 1 to 10, how confident are you that you can improve the skill?
- Have you previously tried to improve this skill? What did you do, and did it work? If it didn't work, why not?
- Are there barriers that presently hinder your progress, and if so, what are they?
- What can you do to minimize or deal with these barriers?
- How will you know if you achieve your goal?

Let's imagine that you are coaching an associate who wants to improve his project management skills—specifically, organize projects more effectively and complete them on time. Through conversations with the associate you learn that he does not have an effective system to identify, review, and prioritize projects on a regular basis, and has not developed basic time management skills to assure the timely completion of projects.

So the next phase of the coaching process—setting objectives—might include creating a master list for all projects, establishing a process to prioritize and re-

prioritize projects, and developing a system to meet deadlines for each project.

Once the objectives are established, the associate can identify two or three specific actions needed to accomplish each objective and assign deadlines to each action. The objectives, actions, and deadlines should be in writing. This will help the partner and the associate track the associate's progress. In this example, the objectives and actions might look like this (since this is a hypothetical, I didn't include deadlines):

OBJECTIVE: Create a master list of projects.

- Decide upon the most effective method for establishing and maintaining the master list (e.g., in longhand or on a computer).
- List all projects and action steps necessary to complete the project.
- List deadlines for each project and all action steps.

OBJECTIVE: Develop a process to prioritize and reprioritize projects regularly.

- Set aside time each week to review the master list and prioritize and reprioritize projects.
- Update the master list weekly for new projects, action steps, and deadlines.

OBJECTIVE: Keep a calendar of project deadlines.

- Enter all project and action-step deadlines in a calendar.
- Schedule periods of time to work on each project (so the time isn't used for other projects).
- Note any information or any tasks that others need to perform in order for the project to be accomplished.

The coaching partner and the associate will need to review the associate's progress in taking the established action steps and meeting the deadlines. This may lead to

modifying the action steps or adding new ones. Upon successful completion of the action steps, the associate should have a workable process for improving the desired skill. The partner should periodically touch base with the associate to support the associate's use of the process and to make sure it is still beneficial. If the associate does not follow the action plan or becomes disengaged, the partner will need to confront him to determine the reasons for the disengagement. If the associate does not renew his commitment to the process, the partner can end the coaching relationship.

Coaching can place great demands on a partner's time and interest. Those demands often conflict with other priorities—billable hours, business and client development, and administrative duties. Also, it is sometimes difficult to find suitable partner-associate matches. For these reasons, firms sometimes use external coaches, despite the expense of such services. Because an external coach is not a stakeholder in the firm, the associate may consider the coaching process more confidential and be more open in revealing his feelings and perceptions. In addition, an external coach is likely to be more skilled in coaching methodology and may have more time to devote to the process.

Whether the firm relies on internal or external coaches, or a combination of both, the benefits of coaching for the firm and the associates are undeniably necessary and immeasurably valuable. In today's competitive marketplace, it is more important than ever that firms find the time, make the effort, and delegate the resources to building and implementing a solid coaching program.

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