

# Baker Donelson Case Study

*Excerpted from:*

***The Integration Imperative***

Erasing Marketing and Business Development Silos —Once and for All— in Professional Service Firms

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**Professional Services Books**

*Concord, Massachusetts*

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## Training Attorneys to Market and Sell: Small Steps Equal Great Gains

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**Baker Donelson** is a regional law firm, and one of the 100 largest in the United States. It developed two new personal productivity programs to help attorneys gain a sense of accountability and improve their skills in marketing and business development. The direct result was higher billings for attorneys who participated in the programs.

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The vast majority of professional service firms operate as privately held partnerships. For many professionals, whether accountants, architects, management consultants, lawyers, or any others whose intellectual capital is the “product,” partnerships are a highly attractive way to participate in running a business. If a relatively inexperienced new hire rolls up his sleeves, puts in long hours, and learns the ropes of the business and the profession from his firm’s senior leaders, he will eventually get a shot at sharing in the firm’s profits, and perhaps its equity.

But these privately held partnerships also feature a double-edged sword. Internal competition is keen. And indeed, especially where colleagues are encouraged organizationally to work together on marketing and business development, trust can be all too elusive. I’ll never forget the moment I realized that “partnerships” don’t always translate into smooth personal feelings between a firm’s professionals. When I was the regional marketing director of a management consulting firm, I attended a proposal planning meeting with the head of one of the firm’s prominent practices. We were discussing how we might assemble a team whose experts could best solve the prospect’s problems. I suggested bringing on board one of the firm’s well-known professionals whose capabilities would be a perfect match for the potential client. The practice leader’s reply was immediate and, I thought, harsh: “I certainly won’t invite *him* to my prospective client meeting! I don’t trust him!”

I’ve encountered many variations of this scenario throughout my career. It’s a vein of “disconnectivity” that runs throughout every business, but it is particularly dangerous in a professional service environment, no matter what the size of the organization. It doesn’t matter what go-to-market processes, protocols, or tools a firm’s leaders might require; if people don’t want to market and sell business together, or for some reason *can’t*, silos inevitably abound. Mergers and acquisitions — a favorite growth mechanism for PSFs — only serve to exacerbate marketing and business development disconnects that already exist.

I was especially intrigued, then, when I heard about the unique marketing and business development integration approach being implemented by law firm Baker, Donelson, Bearman, Caldwell & Berkowitz. Founded in 1888 (yes, you read that right), Baker Donelson was ranked in 2007 by the *National Law Journal* as one of the 100 largest law firms in the United States. The firm’s more than 500 attorneys and public policy advisors work in almost 20 offices across five states. Mostly concentrated in the southeastern United States, the firm also has offices in Washington, DC, and Beijing. Baker Donelson’s practice areas include public policy, health care, securities, and intellectual property. Baker Donelson’s story is a good fit for this book because it emphasizes helping people identify integrated ways to work together. The firm developed two new programs to help attorneys grow a shared sense of personal accountability for the firm’s marketing and business development functions. Instead of requiring a one-size-fits-all process for marketing and selling, Baker Donelson had the professional bravery to help its people build their own new integration processes and grow their competencies in marketing and selling. It also formalized their accountabilities for doing so and tracked their achievement of goals.

Baker Donelson’s approach is a great example of the results a professional service firm can achieve when it intentionally makes marketing and selling every person’s job, even allowing for the fact that each person has a different role to fill.

### When Overachievers Underproduce in Marketing and Selling

The hallways of Baker Donelson’s offices are crammed with gifted attorneys. These attorneys are regularly recognized among peers and industry observers for their professional stature in nearly every aspect of the law.

From 2002 to 2007, through mergers and acquisitions, Baker Donelson more than doubled in size. Even if the firm had the world's most dazzling process handoffs from marketing to business development, that is a lot of new people who are expected to work together to fill the revenue pipeline. The skills and experience needed to generate leads and grow revenues varied widely among these newly incorporated professionals. They simply didn't know each other well enough to market and sell business together as effectively as they could.

But Baker Donelson's executive committee members believed they faced an additional challenge. The firm's most senior attorneys — even as talented as they were — weren't as productive in marketing and selling as they should have been. "Many of our most experienced attorneys had gotten set in their ways and were not experiencing the same growth in their books of business as they had experienced in years past," commented Jerry Stauffer, the firm's chief operating officer.

## **It's Personal: "Getting to Know You" to Help Break Down Marketing and Business Development Silos**

In 2006 Baker Donelson's marketing and professional development departments (including Laura Hine, chief marketing officer, and Susan Wagner, director of professional development) embarked on a joint initiative to help all these professionals improve their delivery of excellent client service, time management, and business development. Called PracticeAdvance, the program offers year-round training classes to all attorneys at all levels. The monthly sessions focus on how to build relationships with clients, improve individual marketing skills, and become more proactive in seeking new business for the firm. Hine explained:

By creating PracticeAdvance, Baker Donelson's Marketing and Professional Development departments have invested in the Firm's greatest, client-focused assets: Baker Donelson attorneys. Participants gain the tools necessary to be more effective, efficient attorneys, in a setting that is comfortable and informal. Discussions of each topic by and between attorneys at different levels of experience are encouraged. The Firm's attorneys are the Baker Donelson brand, and the PracticeAdvance program builds upon the strength of that brand.

Within the first 12 months of the PracticeAdvance program, more than 350 attorneys had participated. After each program, a survey was submitted to gauge the overall response to the program. The comments were incredibly positive. One lawyer stated: "The program today caused me to rethink the way I manage my contacts and the importance of keeping those contacts up to date and staying on top of how often I am interacting with each client, referral source and prospect. Thanks for the ideas!"

In 2006 the firm's new director of client development, Tea Hoffmann (now chief business development officer), went to COO Jerry Stauffer to suggest an extension of the PracticeAdvance program. Hoffmann wanted the firm to capitalize on her strong background of success in increasing people's productivity in marketing and business development (she had already authored a book on the subject; earlier she had run her own consulting company helping legal professionals grow their businesses; and she was recognized as one of FranklinCovey's top trainers in 2007 and once held the only FranklinCovey U.S. training license for law firms).

Hoffmann believed Baker Donelson had taken some critical first steps, but that it was now time for the firm to go beyond its PracticeAdvance program by taking another important step: developing an initiative to enable Baker Donelson attorneys to work together more effectively to market and sell.

She asked Stauffer for funds to take the firm's senior attorneys through her customized version of the FranklinCovey "7 Habits™" and "FOCUS™" programs. They agreed it would be better to make the program voluntary, available first to the most interested attorneys. From Baker Donelson's perspective, Stauffer's goal was to help these selected attorneys develop more business with existing clients. But Hoffmann knew the outcome of participating in a FranklinCovey program could even be more deeply personal.

Stauffer and Hoffmann developed a six-month program called "20 Over 40," and geared it toward senior-level attorneys aged 40 and older. They planned to accept applications from attorneys who wanted to increase their personal and professional productivity. "When the 20 Over 40 program was announced in September, 2006, we thought we would start with only one group of 20," said Hoffmann. "The response was overwhelming. Almost immediately, the participation roster swelled to 78 people, with a waiting list. We ended up creating four groups of about 20 each."

The program, which began in October 2006, featured some clearly defined rules. Participants would not be allowed to miss any more than two of the monthly all-group sessions. And everyone was required to attend a one-and-a-half-day class on how to obtain “focus” and develop goals. Each participant was asked to develop two professional goals and one personal goal in conjunction with a randomly selected “accountability buddy” who was also at the retreat. The goals were then shared with the rest of the group. Each goal had to include a fully developed plan of execution and designated timelines.

The initial “focus retreats” were conducted off-site at state parks so that distractions would be minimal. The training was intense. Attorneys revealed many of their personal aspirations to the entire group, and in most cases many of them were meeting in person for the first time. The bonding experienced by the entire group was perhaps one of the most beneficial outcomes of the entire program.

Once goals were set and openly stated, the accountability buddies were selected, and the participants had returned to their respective cities, progress was measured monthly. Participants had to not only work toward their goals, but also read at least two books during the course of the program and present a “book report” to their respective groups. In addition, they had to attend monthly training and refocusing classes and receive personal coaching from Hoffmann on how to keep on track.

### **Small Steps Equal Great Gains**

Hoffmann offered three examples of the positive impact of Baker Donelson’s 20 Over 40 program:

- An attorney who set a professional goal of personally visiting existing clients, for no reason at all, conducted more than 30 visits during the course of the six-month program. In doing so, he opened up 13 new matters and received two referrals for new business.
- An attorney who decided he wanted to launch an International Franchise Association (IFA) networking group for the state of Tennessee worked with one of the firm’s marketing professionals to set up a series of events, hosted in Baker Donelson’s offices and videoconferenced to other offices throughout the state, to facilitate franchise leaders’ discussions about current industry topics and to help them access valuable educational opportunities. More than 30 people came to his first IFA meeting, and only 13 were existing clients. He now offers these sessions once a month to five offices within the firm and averages more than 50 attendees per month. Meanwhile, he has been named the head of the firm’s Hospitality and Franchise Industry Service Team, and he has built his book of business to nearly \$1 million a year with this new focus.
- An attorney who had recently joined the firm after serving as general counsel for a publicly traded company found the road to rebuilding her book of business more difficult than she had anticipated. Her goal was to build her book and her hours. The program allowed her to meet attorneys throughout the firm and share her expertise. Within a few months, she not only was able to meet her goal of rebuilding her book of business, but also gained referrals from members of each of the 20 Over 40 groups that enabled her to meet her productivity goals sooner than expected.

The results, then, were strongly positive. In their six months of participating in the program, this inaugural group of 20 Over 40 members increased their revenue productivity by nearly \$3 million compared with the same six months of the previous year.

Hoffmann also saw the positive effects of the working relationships and shared accountabilities between the firm’s revenue-generating attorneys and its nonrevenue-generating marketing and business development professionals. Marketers and business developers gained a better understanding of the business world in which their professionals operated. The lawyers learned how to better support the firm’s marketing initiatives. And they gained a greater appreciation of the value provided by their nonrevenue-generating marketing and business development staff.

For example, while most of these talented lawyers knew of the firm’s competitive analysis abilities, many had gotten lazy about researching their existing clients and prospects. One program session featured the firm’s competitive analysis manager, who did a report on one client or referral of each participant. Working with their

accountability buddies, participants were asked to look for one “unexplored” opportunity and develop a plan to explore that opportunity.

But beyond the arguably touchy-feely aspects of “understanding” and “appreciation,” participants and their marketing and business development colleagues added new competencies. Then they practiced their newly acquired skills and celebrated their achievements.

The firm’s marketing department also received public kudos in December 2006 when it was recognized in “The Second Annual *Marketing the Law Firm* 50: The Top Law Firms in Marketing and Communications” for creating and implementing its two attorney training programs.<sup>2</sup>

At the conclusion of the program, each person received a trophy — a leather baby shoe. It was certainly not a traditional choice to honor the completion of a significant task, but that was the point. The small leather shoe signified not only the small steps that each person had taken, but also the small steps they would continue to take over time: greatly enhanced skills to more effectively generate more revenues with more deeply integrated marketing and business development processes.

Many small steps, taken over time, lead to real progress. All this, simply by asking attorneys to volunteer to be held formally accountable for collaborating on marketing and business development.

“The program greatly exceeded my expectations,” said Stauffer. “Not only did more of our lawyers participate than I expected, but the level of genuine enthusiasm and deepening of personal relationships was something truly unique.”

### **Growing a Professional Service Firm . . . Together, One Step at a Time**

From a firm-wide perspective, one of Baker Donelson’s most significant lessons learned from the 20 Over 40 program was the tight bonding that occurred among members. Even after the program ended, and even though they worked out of 15 different office locations, the first group of attorneys continued to meet and interact with each other to cross-market and cross-sell. On a daily basis, they help each other set goals. Their shared accountability continues.

Hoffmann and her team also learned, the hard way, not to facilitate so many groups concurrently. Indeed, even though the initiative was clearly a success, she felt it could be even more so if she concentrates next on a smaller group. Another lesson learned: the firm decided to run its 20 Over 40 program every other year instead of annually. According to Hoffmann, “The resources required to co-ordinate the program and maximize its potential should be laser-like focused and can cause other programs to suffer. Conducting the program every other year enables our entire department to give each activity the appropriate amount of energy without overtaxing its resources.”

Last but not least, Hoffmann was gratified with one of her early decisions: the program did not need to be high glitz. Attorneys were quite satisfied to meet off-site at state parks, for example, rather than high-priced conference venues. In fact, this decision likely enhanced the program’s uniqueness and stimulated an unexpected sense of informal camaraderie.

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*Suzanne Lowe, the president of Expertise Marketing LLC, is the author of two books for leaders and marketers at professional service firms: *The Integration Imperative: Erasing Marketing and Business Development Silos – Once and For All – in Professional Service Firms and Marketplace Masters - How Professional Service Firms Compete to Win*. For more information see <http://www.expertisemarketing.com>.*