

# Case study in legal business development: Adams and Reese



*A LegalBizDev case study by Jim Hassett and Jonathan Groner  
March 2015*



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## Executive summary

This brief case study describes the remarkable success of a business development coaching program at Adams and Reese, a regional firm in the southeastern United States with over 300 lawyers. While LegalBizDev has offered successful coaching programs to groups and to individual lawyers for the last eight years, the results for 52 lawyers at Adams and Reese have produced unusually high rates of immediate success, including:

- 2.9 new matters per lawyer during the coaching program
- 72.2 advances per lawyer towards attracting additional work including meetings, calls, introductions, and proposal opportunities

The net value of this new business far exceeded the cost of the coaching program.

There were two critical success factors behind these dramatic results:

1. The degree of management commitment and support, including close coordination with internal business development staff
2. The firm's ability to deliver the kinds of legal services that clients are looking for these days, at a price they are willing to pay. As a regional firm with more than 300 lawyers and relatively low overhead, Adams and Reese was well positioned to offer this. Individual lawyers and firms with higher hourly rates may be forced to increase efficiency in order to achieve similar success.

## The case of Adams and Reese

Over the last eight years, we have helped individual lawyers and large groups increase new business throughout the U.S. and around the world. But we recently completed a business development coaching program for Adams and Reese in which the results are off the charts. This brief case study explains why they were so successful.

The firm has over 300 lawyers in 17 offices throughout the southeastern U.S. In 2012, they implemented a new five-year strategic plan that was built around growth. According to Managing Partner Chuck Adams, "We saw a unique opportunity for regional firms like ours and realized that to take advantage of it we would need to re-focus every lawyer on increasing client satisfaction and re-energize our business development initiatives."

They conducted a national search for a consulting firm to help with this initiative, and ultimately hired LegalBizDev to develop and deliver a customized coaching and training program.

This case study focuses on the 52 lawyers who have completed our nine-call coaching program so far. Additional lawyers may be added to the program in the future.

The average Adams and Reese lawyer finished the program in about five months. Since most legal business development takes much longer than that, we usually measure success by reporting "advances" – specific actions that move a new matter forward – such as holding a

meeting or getting an introduction to a decision maker. This group recorded a total of 3,755 advances, or more than 72 advances per lawyer, above our averages with other clients.

More importantly, whenever we coach a group of lawyers, inevitably some new business comes in while we are working with them. When it does, we always ask, “Do you think this new business was related to the coaching?” If the lawyer says no, we move on. But if they say yes, we record the details in our monthly reports and make sure that everyone knows that the process is working. The most amazing thing about this group was that they reported a total of 149 new matters before the coaching even ended, or about 2.9 new matters per lawyer. The net value of this new business far exceeded the cost of the training program.

And as business continues to grow for these lawyers after the coaching, the return on investment continues to rise.

### **Individual results: A litigation example**

To cite just one example of how it worked, consider the case of Deb Oliver, a litigation partner based in Tampa, who said her coach emphasized that the most important goal of the training was “accountability to yourself.”

“Client development is largely a game of numbers and of being in the right place at the right time. This just requires persistence,” said Oliver.

“You need to set interim benchmark goals that you can live up to,” she continued. “These can be current clients that you wish to grow, or new clients. My list of existing and potential clients was long, so I learned that the key was to use my contacts list religiously. I needed to schedule a series of calendar appointments to set times to remind these people that I exist.”

Oliver’s task was somewhat complicated by the fact that most of her clients and contacts are not in Tampa. “Sometimes for me, staying in touch involves looking six months out and scheduling trips out of town, just to get in front of people,” Oliver said. “I really had to carve out time and organize that time well. I learned how to develop tools to do this as efficiently as possible.”

Another important lesson Oliver took away was that business development “is very much about listening and understanding a client’s real objectives. Litigation clients can have many goals; you need to understand the particular goals of each individual to fulfill your duties.”

As a result of more actively initiating dialogs about client needs and satisfaction, Deb brought in several new matters which she attributed to the coaching.

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## The program

Adams and Reese kicked off their business development program at a retreat where I gave a live presentation. We then followed up with two webinars to the entire firm. My three presentations reviewed the top 10 ways to increase results from your limited marketing time, which are explained in part one of my *Legal Business Development Quick Reference Guide*:

1. Prioritize relentlessly
2. Start with current clients
3. Listen
4. Plan advances
5. Follow up
6. Work with others
7. Focus on personal strengths
8. Assess the importance of relationships vs. value
9. Measure results
10. Don't stop

The content was customized to fit the firm's needs.

Training of this sort sets the stage and helps lawyers decide whether they are prepared to commit the time necessary to succeed. But to produce an immediate impact on the bottom line, you need one-to-one coaching.

To date, five LegalBizDev principals have served as coaches for Adams and Reese: Tom Kane, Gary Richards, Fred Kinch, Ed Schechter, and Tim Batdorf. All followed the same basic procedure which starts with a one-hour call to discuss the background and goals of each lawyer. We then discuss best practices from other attorneys that relate to each individual's objectives and we brainstorm initial action items. This is followed by eight additional 30-minute calls to monitor progress, pursue the most promising opportunities, assure efficient follow-up, and reinforce business development skills and long-term habits, including sustainability tactics for after the coaching ends. Throughout the coaching we refer frequently to job aids and templates in our *Legal Business Development Quick Reference Guide*, and after each call we email a list of action items that the lawyer has identified.

While most clients prefer to schedule weekly calls, Adams and Reese felt that calls every other week would work better to allow sufficient time for lawyers to accomplish their action items.

We also provided unlimited email support between calls to help lawyers with the tasks and priorities they've identified, such as researching potential clients, drafting emails to reconnect with former colleagues, writing an agenda for a business development meeting, editing PowerPoint presentations to increase their marketing impact, or doing whatever it took to help them bring in new business.

Finally, at the end of every month, we provided a summary report to management that included tables showing how many hours per week each lawyer had devoted to business development, the advances they had achieved, and the dates they had participated in coaching telecons. These

monthly reports also documented the details of all of the advances planned and achieved by each lawyer. This level of detail kept Adams and Reese business development staff in the loop so they could assist with ongoing actions and transition to assist lawyers after our coaching ended. The monthly reports and other progress details were also shared with firm management.

### **Individual results: More examples**

Eric Partlow, a Tampa-based litigation partner, explained that “it’s not rocket science or magic. But the ideas I received from my coach were based on studies and research of what works. For example, if I had an event coming up, I would ask my coach for advice. Some events work well in terms of business development and some don’t, I learned. For example, joining numerous committees as marketing opportunities has traditionally been perceived as a good idea, but it’s not always so. While we should all strive to contribute through our service on committees, when it comes to marketing, there are better ways to maximize your efforts.”

Partlow said his coach asked him to focus not so much on creating new business leads as on making the most of the leads he already had.

“Once I was forced, during the coaching process, to examine the relationships I already had, I was surprised about how many could be helpful in developing new business,” Partlow said. “And with them, it’s back to basics. Give a call, send an email, keep yourself in the forefront of their minds. You become an option for them that may not have existed before.”

Partlow said he felt “very encouraged to discover these opportunities. For me, one key insight was overcoming the hesitation to ask for work directly. People consistently overlook the importance of simply asking.”

Like others in the program, Partlow obtained several new matters by reaching out to clients and prospects more frequently. He found the *Legal Business Development Quick Reference Guide* to be a quick and reliable resource, including the chapter on “67 ways to get a conversation going.”

Greg Rouchell, a New Orleans-based litigation partner, came to the coaching with far more business development experience than most of the other lawyers and saw the program as an opportunity to brush up on his skills.

“I focused on organizing all my contacts and keeping track of the times I reached out to them,” says Rouchell. “Instead of email, sometimes a handwritten note is what you need to develop a better professional relationship. After all, most lawyers are competent at what they do. You need that something extra to set you apart, and that is the recipe for success.”

Rouchell says he learned that the “touches” with potential clients can take many forms. For example, around Mardi Gras he sent several clients a king cake from New Orleans.

“My takeaway,” Rouchell said, “is to maintain relationships and not become frustrated. It can easily take months or even years to develop a client. You don’t want to look back 10 years later and say, ‘I should have done this sooner.’”

“This coaching process served to remind me of the importance of doing this. You can’t slack off. You just have to make time and do it,” Rouchell concluded.

When Rouchell reached out to one client for whom he had recently settled a case, they asked him about handling a new case in a very specialized area. He explained that it was outside his area of expertise, but that others in the firm could handle it. The client decided to send the matter to the firm because they had developed confidence in Rouchell.

### **Critical success factor #1: Management commitment and support**

The business development coaching process described above has been refined over the years and has helped lawyers at many firms to:

- Bring in new business from current clients
- Increase the client retention rate
- Find new clients
- Focus limited marketing time and scarce resources on the activities that are most likely to lead to new engagements
- Undertake business development activities that they want to accomplish, within a weekly time commitment that they agree to
- Develop skills and habits which continue to pay off after the program ends

But Adams and Reese took the success of our business development coaching to extraordinary heights. The average lawyer brought in 2.9 new matters before the coaching ended and many more after the program was over.

Why was the business development coaching so successful at Adams and Reese?

Because their management did everything right. They were so focused on the program that they even helped us invent a few new steps.

Whenever any law firm asks us to define the single most important factor in success, we always say the same thing: give us the right lawyers to coach, people who are motivated to succeed and committed to devoting time to business development week after week.

If they have never brought in a single new matter before, we will show them how it is done and establish habits that will work for a life time. If they are already top rainmakers, that’s even better, because we will help them become more successful. Experienced rainmakers are our absolute favorite candidates, because they produce the largest results in the shortest period of time. A five percent boost in a rainmaker’s book of business will generate far more revenue than a 100% increase for a novice.

But this advice comes with a caveat. In our experience, great legal rainmakers come in two categories. The first group is perfectly satisfied with the way they do things and have no interest in talking to consultants. Our approach with this group is to get out of their way and pray for their health, since they are helping to generate the revenue that pays for everything else.

The second group may be skeptical about whether consultants can help, but they are always looking for new ideas to get an edge. These are our absolute favorite candidates, because a very small adjustment in their tactics can produce a large and immediate return.

Over the years, all of our clients have taken this advice seriously, but none as seriously as Adams and Reese. Their most promising coaching candidates were selected based on input from the executive committee, practice group leaders, and their business development team. Each was then offered the program on the condition that she or he commit at least three hours per week to business development for the duration of the program and that actual business development hours would be tracked and reported to management. (Interestingly, to date the lawyers in the program have actually averaged about double what they were asked to promise: 6.0 hours per week on business development.)

After Adams and Reese had the list of candidates in hand, they did something we had never seen before: Managing Partner Chuck Adams and Chief Marketing Officer Ann Wallace jointly scheduled a meeting or telecon with each and every candidate to discuss their goals and confirm their commitment. In a few cases, lawyers who had previously said that they could devote the required three hours per week to the program reconsidered when they were reminded of the firm's investment in the program and the significance of their participation. Several postponed the coaching to a later date after cross-questioning revealed that this was simply not the right time for them. These candidates were replaced by others who could and did make a firm commitment.

When we first started coaching lawyers, we always began programs like this with a group meeting in which people shared their goals and established a foundation for group support and achievement. But then we found this could delay program start by months because it was so hard to get a group of lawyers to find a single time when they could all meet. So we have dropped the group meetings, and at firms where we just work with one lawyer at a time, start coaching whenever they are ready to begin.

Adams and Reese liked the initial meeting idea, so we went back to that format and they made sure that the lawyers showed up. Inevitably, in a few cases lawyers were unable to come due to last-minute client demands. A separate meeting was held with each of them later to kick off the program.

As the program proceeded, management carefully monitored the progress reports and issued a series of internal announcements congratulating people who had brought in new business.

Adams and Reese also added an innovation at the end of the coaching. Part of what we do in the last few coaching sessions is talk about establishing systems to assure sustainability, such as working with the firm's business development staff to maintain the activity monitoring that is so important to success. They took it one step further.

In the view of CMO Ann Wallace, this was absolutely critical. "We did not want to run a program that succeeded once and then faded away. We wanted to make sure that we integrated these new habits into our day-to-day business. Therefore, when each lawyer's program ended, I arranged a telecon in which the coach 'handed off' the lawyer to the business development

manager they normally worked with. They discussed what worked in the coaching, what hadn't, and devised joint strategies to sustain success, one lawyer at a time."

## **Critical success factor #2: Provide the services that clients want**

To fully understand the success of the Adams and Reese coaching program, there is one more factor that cannot be ignored: the firm's ability to deliver the kinds of legal services that clients are looking for these days.

An extremely important ingredient in sales success is having a product that people want to buy. You've probably heard the cliché that a great sales person could "sell ice to Eskimos." But when the Gallup Organization reviewed 40 years of research on sales (in the book *Discover Your Sales Strengths*), they found evidence that "a good salesperson can sell anything" is a myth. No matter how talented the sales person may be, or how well they are coached, they will not get rich selling Betamax recorders or 3.5-inch computer disks.

These days, what most legal clients want to buy is value. They want the same high quality legal services they have been getting for years, but they also now expect firms to be creative, transparent, efficient, and cost-effective. As a regional firm with more than 300 lawyers but significantly lower overhead than name brand firms based in cities like New York, Chicago, and Los Angeles, Adams and Reese is in a very good position to offer the kind of value that many clients are looking for.

A few months ago, the *Wall Street Journal* blog posted an article with the headline, "Smaller Law Firms Grab Big Slice of Corporate Legal Work... Midsize Firms Nearly Double Share of Big-Ticket Litigation."<sup>1</sup>

The data behind the headline is described in a *Harvard Business Review* blog post which was co-authored by Firoz Dattu, the founder of AdvanceLaw, "an organization helping its general counsel clients identify top lawyers at firms vetted for quality, innovation, efficiency, and client service."<sup>2</sup>

AdvanceLaw clients include companies like Google, Deutsche Bank, NIKE, Nestlé, Starwood Hotels, 3M, MasterCard, eBay, and McDonald's, all of whom are looking to lower costs and increase efficiency.

At this time, only 10 law firms in the United States have been vetted to belong to this value providing network. Adams and Reese is at the top of the list on the AdvanceLaw web page. (All right, it's in alphabetical order, but still...)

So you could say that another reason for the success of this particular coaching program was that as a growing regional firm, Adams and Reese was well positioned to provide the high value

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<sup>1</sup> <http://online.wsj.com/news/articles/SB10001424052702303672404579149991394180218>.

<sup>2</sup> <http://blogs.hbr.org/2013/10/why-law-firm-pedigree-may-be-a-thing-of-the-past/>.



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services that clients are currently demanding. (Not all firms are so lucky, which is one reason legal project management<sup>3</sup> has become so popular as a way to increase efficiency.)

### **Individual results: A transactional example**

At the end of the day, developing new business ultimately comes down to understanding what clients want and giving them just a little more. Derek Anchondo, an Adams and Reese special counsel who does transactional work for oil and gas clients in the Houston office, agreed. As a former in-house counsel himself, he often sees things from the client perspective. Business development coaching helped him sharpen this perspective and frame it in a way that gained the trust of prospective clients.

“When you go into a client meeting, you need to be totally prepared to hear the client’s point of view,” Anchondo said. “Just listen. Don’t go in with a forceful sales pitch right away, just let them talk. You can learn so much by listening.”

Anchondo learned that sales progress is possible only after learning the prospective client’s needs. Then – and only then – can he decide which members of his firm might best meet those needs.

“We wanted to build work from one particular client, and we realized that our challenge stemmed from their existing relationship with a different law firm,” Anchondo said. “My coach and I brainstormed ideas. We had four or five meetings, and I familiarized them with our fees and services available in the Houston office. Now they are thinking of expanding their work with us to include tax and OSHA work. It took that many meetings to swing the pendulum, but the approach worked.”

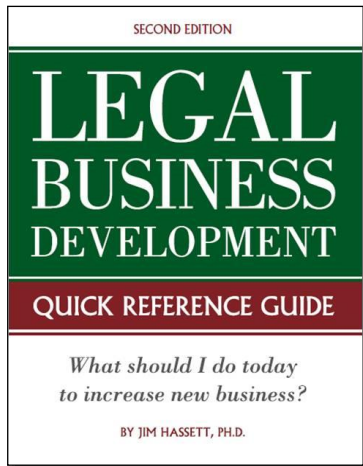
No matter how you do it, business development simply takes time. Many law firms have strategic plans that call for growth, but Adams and Reese is one of the few we have seen that is investing the time and money needed to achieve their goal. The investment has already paid for itself and is continuing to produce ever higher returns.

This case study has important implications for lawyers who are considering business development coaching either as individuals or as part of a large group. Lawyers will be able to produce more new business more quickly if they get strong management support and assure that they are providing the kind of high value services that clients are looking for in the current competitive environment.

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<sup>3</sup> <http://www.legalbizdev.com/projectmanagement/index.html>

## About the book



*Legal Business Development*  
*Quick Reference Guide*  
 Second edition  
 By Jim Hassett, Ph.D.

The book used in this program is available at [www.legalbizdev.com](http://www.legalbizdev.com) for \$79.95, with volume discounts up to 50% on orders of multiple copies.

A Kindle edition is also available on Amazon.

204 pages, 8.5 x 11”

## About the authors of this case study

**Jim Hassett** is the founder of LegalBizDev, which helps law firms increase profitability by improving project management, business development, and alternative fees. Before he started working with lawyers, Jim had 20 years of experience as a sales trainer and consultant to companies from American Express to Zurich Financial Services. He is the author of 13 books, including the *Legal Project Management Quick Reference Guide*; *Legal Project Management, Pricing, and Alternative Fee Arrangements*; *Client Value and Law Firm Profitability*; and the *Legal Business Development Quick Reference Guide*. He has also published more than 80 articles in the *New York Times Magazine*; *Bloomberg Law*; *Of Counsel*; *Legal Management*; *Strategies: The Journal of Legal Marketing*; and other publications. Jim is a frequent speaker at law firms and at bar associations (including the New York City Bar, the New York State Bar, and the Massachusetts Bar), Harvard Law School; the Association of Corporate Counsel; the Defense Research Institute; the Ark Group; and at Legal Marketing Association meetings in Boston, New York, Philadelphia, Washington, Savannah, and Vancouver. He has conducted webinars through the Ark Group; West LegalEdcenter; the National Law Journal; The International Lawyers Network; TAG Academy; and the Legal Marketing Association. Jim writes the blog “Legal Business Development” which was featured at the ABA TECHSHOW (in its list of “60 Sites: Latest and Greatest Internet Hits”) and by TechnoLawyer (in its list of “the most influential legal blogs” in BlawgWorld). He received his Ph.D. in psychology from Harvard University.

**Jonathan Groner** is a public relations specialist, a freelance writer, and a lawyer. He has previously worked as a Marketing Manager at Jenner & Block, as Senior Communications Counsel at Womble Carlyle, and as Managing Editor at *Legal Times*.

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## About LegalBizDev

LegalBizDev helps law firms enhance client service and increase profitability by improving project management and business development. We offer coaching, webinars, workshops, retreats, train the trainer programs, publications, and more.

We help each individual identify the action items that are most likely to produce immediate and practical results for their practice, their personality, and their schedule. Our proprietary process helps lawyers to make the best use of their limited time by quickly building on best practices from other law firms and other professions.

Through a strategic alliance with Altman Weil, we also offer clients a broad range of management consulting services in related areas, including strategic planning, practice group management, client surveys and custom benchmarking, lawyer compensation systems, marketing strategy, and much more.

LegalBizDev has developed and delivered award winning training since 1985. For more information, visit our web page at [www.legalbizdev.com](http://www.legalbizdev.com), call us today at 800-49-TRAIN, or email [info@legalbizdev.com](mailto:info@legalbizdev.com).



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