Learn to Use C-Suite Coaching Skills

Presented by
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5/3/2018
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For the Leader in You

Managing Up Is Easier Than You Think

By Anne Collier
Posted on February 12, 2018

Is your manager a mystery? Are you frustrated because you never seem to make your manager happy? Does it seem as though you and your manager never see things the same way?

You Can Be More Successful by Being More Strategic

Imagine that your manager relies on you, gives you opportunities, and tells the higher-ups what a great job you’re doing. The good news is that you can be more successful, impressing your manager, without having to burn the midnight oil even later into the evening. The solution is to slow down a bit so that you can be strategic about how you engage with your manager.

5 Strategies for Triumphanting Over The Disconnect
1. Identify the Differences: What is the source of the disconnect between you and your manager? If your manager is a micromanager, wanting all the details and tasks planned down to the most granular level? Or, is your manager the kind of person that never gives you enough direction? Clarify the source of disconnect. Maybe your team has completed a team-building workshop in which you explore different Myers-Briggs Types (MBTI) or DiSC, which would readily provide you with the information you need. Those of you who are MBTI aficionados, probably recognize the differences between the Perception Functions: Sensing and iN

2. Adjust Your Style: Once you’ve identified the differences that are the source of the disconnect, adjust your style to your manager's. For example, if your manager is focused on details, always be ready with details. If your manager finds details tedious, relay the big picture, but no details until asked. Get the idea?

3. Clarify Expectations: With #1 and #2 under your belt, let’s focus on what you need to work with a greater sense of purpose and success. Often, the biggest frustration between a manager and subordinate occur when they are not on the same page. To clarify your manager’s expectations, use Coaching Skills (https://arudia.com/secret-amping-indispensability-executive-presence/), which means asking targeted open-ended questions to gain better understanding of what your manager wants from you. For example, questions such as:
   - What's most important about this project to you?
   - What does success look like?
   - Where do you anticipate I'll have challenges?
   - What does the end product look like?

4. Understand the Goal: Be sure you understand your manager’s goals and distinguish them from the strategies available for accomplishing the goals. Most managers care more about you achieving the goal rather than following rote processes. Use the questions in #3. This is different from clarifying the work product – it’s the bigger picture.

5. Support Your Manager in Prioritizing Goals: Some of you won’t be surprised that your manager doesn’t always have priorities top of mind. Your manager just continues to hand out projects. If the work keeps piling up and you are overwhelmed, ask your manager to prioritize for you. And remember, sometimes “ASAP” can denote urgency or means “as soon as you can work it into your schedule.” Be sure to clarify.

If you want to learn more about different Types and styles, and you’re in the DC area, join me on:
   - February 16 for Working with Different Personality Types or
   - March 9 for Tactical Leadership Skills,

Register here (https://www.wgr.org/Leadership_Development).

If you can't make the February 16 program, but would like to learn your Type, access TypeCoach here (https://arudia.com/product/learn-your-type/). And, check out our virtual training (https://arudia.com/virtual-training/) if you're interested in adding to and refining your communications skills.

If you found this post useful, please share with your colleagues and friends and let us know what you've done to manage up. For more information about Type, please download the excerpt from my Personality Type workbook.

And, if you'd like help in understanding what's wrong with your colleague, let's talk! You can reach me at anne@arudia.com (mailto:anne@arudia.com) or 202-449-9751.
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For the Leader in You

The Practical Guide For Getting Your Team To Better Relate

By Anne Collier
Posted on October 30, 2017

Individually, each of your team members is fantastic. They are smart, hardworking, and committed to excellence. But something isn't right. And that something happens when they're in a room together. **They don't seem to relate to each other and you're not sure why.** You just know that it's affecting the team's ability to deliver and that worries you.

**You’re Not Imagining it, and You Can Improve Your Team’s Culture**
Here's what happens: team members are certainly cordial to each other but it stops there. They don't laugh, other than very politely. And, in meetings, they seem on edge or bored or both. You've sponsored lunches and happy hours with lackluster results.

You know what needs to happen to deliver excellent results: team members need to be comfortable with each other, leverage each others' strengths, and have some fun. But how? Keep reading!

**Cultivating Better Relationship, Results, and Fun At the Same Time!**

To transform team members' lackluster relationships, which contribute to a ho-hum environment where everyone experiences work in boring shades of gray, into the kind of relationships that create a colorful and energizing environment requires:

1. Helping team members to understand each others' strengths and blind spots, and
2. Building their skill in leveraging each other's strengths.

The best way to accomplish these goals is to hold a retreat in which the focus is on learning about each other through an assessment tool and then learning the communication tools to leverage the inevitable differences and to support each other's blind spots. I prefer the Personality Type (Myers-Briggs Type Indicator via TypeCoach) and problem-solving style (Kirton Adaption-Innovation Inventory) and there are many others. A great facilitator can ensure your team members learn about each other while having a great time.

After you learn about each other's strengths and blind spots and you'll laugh as you understand why certain team members haven't gelled. Yet. You'll also notice team members having fun and laughing as they understand the perfectly reasonable explanations for the others' behavior. Importantly, the explanation is NOT that the other person is a jerk!

Next, you want to provide team members with the communication tools to put this newfound understanding to use for the betterment of the team, immediately. The *Arudia Win-Win Conversation Model* is one such tool. This is because when team members learn the win-win mindset, which replaces the blame-oriented thinking with solutions-focused thinking, they focus on solving problems to meet all needs, not just their own. They are, consequently, more creative and collaborative. This is only one of the many benefits of the *Arudia Win-Win Conversation Model*.

Second, team members who learn how to use the *Arudia Coaching Model* and, more generally, coaching skills with each other, instantaneously create the kind of collaboration that fosters respect and creativity and, better relationships. The key to coaching is to ask thoughtful open-ended questions to foster your colleague’s best thinking; you can either follow the entire model below or just one step. The reason coaching brings colleagues is that asking another for his or her thoughts with respect to an issue shows that you value the person's insight and ability to think through tough challenges. In fact, the use of coaching instead of giving advice demonstrates that you think your colleague has his or her own answers and are interested in them more than you are interested in being the hero. That is the ultimate sign of respect.

Now, ask yourself, how fun is that?!

If this post made you think, share it with friends and colleagues. If you'd like to learn more, download *The Tortoise and the Hare* and *Lead With Aplomb*. And, don't forget to reach out to us with questions and comments.
Tortoise and the Hare and Lead With Aplomb

Think Your People Are on the Same Team? Think Again. (https://arudia.com/people-same-team/)


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One of the most difficult challenges a manager faces is effectively dealing with an underperforming employee. Sometimes the manager suspects that an insurmountable obstacle is preventing the otherwise talented employee from meeting expectations. Add to that the frustration and time it takes to counsel the employee, give the employee the opportunity to correct the problem, and to document the process accordingly. And, if the employee doesn’t correct the problem, the manager must implement a performance improvement plan (PIP) or take more drastic action.

The vignette below illustrates how the manager can address underperformance in a practical way, by being direct and collaborative using two communication models. Used appropriately, these models will enable the manager to:

- Make the firm’s expectations clear with respect to work product and behavior.
- Engage the employee in resolving the identified challenges.

A benefit of using this process is that the manager has either resolved the problem or laid the groundwork for a PIP or termination. If the latter, using the techniques will lead to the employee feeling more fairly treated, which means...
a smoother transition. Critically, no question will arise about whether the person understood and met the expectations. No one enjoys having difficult conversations, and, while direct, these techniques are not confrontational, which increases the likelihood and ease with which the manager will initiate and execute the conversation successfully.

Meet Pat and Chris

Pat could be a practice group chair, partner or the chief talent officer. Chris could be a junior associate or a staff member. The firm could be big and multi-city or a 25-person firm in the Midwest; it doesn’t matter, because the techniques Pat demonstrates can apply to any situation in which behavior or performance is below standards.

Chris frustrates Pat with inconsistent and often late or last-minute completion of a project that shows inadequate reflection. Pat has discussed this with Chris to no avail numerous times. Pat’s colleagues are calling for more drastic measures; Pat would too, but for the nagging feeling that Chris is capable of delivering excellent work on time. Pat also realizes that the appropriate procedures need to followed and documented when counseling Chris. Pat hopes that with a more effective conversation, Chris will be able to turn his performance around. Pat also hopes to understand what’s preventing Chris from delivering great work on time.

Change The Style Of The Conversation

Pat decides that it’s time for a different approach, and chooses a combination of The Win-Win Conversation Model and The Coaching Model. Using the former is necessary to keep Chris focused on resolving the problem, rather than being defensive. Win-Win’s foundation is the paradigm shift from scrutinizing issues in terms of right-versus-wrong to a focus on problem solving to meet needs. Rather than focus on who or what’s to blame, Pat will work with Chris to collaboratively create a strategy that will result in Chris supporting Pat and other partners in meeting the firm’s or a client’s needs.

To have a Win-Win Conversation follow the model below:

- **Step 1: State the Facts** neutrally and without judgment. This means stating the facts very concisely and avoiding loaded words such as “should” while maintaining a matter-of-fact demeanor and tone.
- **Step 2: Be Aware of and State Feelings** as you deem necessary. Feelings such as concern and frustration are common and generally considered acceptable in the workplace.
• Step 3: Be Aware of (and State) Needs as necessary. It’s important to distinguish between needs and the range of strategies that might satisfy those needs.

• Step 4: Make a Request using the “magic” language, “would you be willing to...?” The phrase is effective because it is clearly a request, as distinguished from a demand, which is more likely to foster collaboration and alignment.

• Step 5: Agree on Strategy by working through details such as deadlines and resource needs.

At its foundation, Win-Win requires you to distinguish between the goal and the strategy, to be aware of your own and other’s feelings and needs with respect to a particular concern, and to work towards a strategy that meets both parties’ needs. Note that implicit in any strategy in which Chris supports Pat, Chris becomes more successful. In working through a performance issue, be sure to distinguish between goals and strategy, getting alignment on the former first. It’s easier to work through any challenge when you start with agreement on the goals.

When it comes to supporting an employee in identifying solutions, the manager will ask open-ended questions. Think about it: if an employee struggles with performance, and instead of developing a new strategy, all you do is reiterate that the performance is unacceptable and give the same ineffective advice, you won’t see improvement because the employee won’t know what to do differently. If, on the other hand, you’re using Coaching Skills along with Win-Win, you are more likely to achieve buy-in to the process, and leverage the employee's best thinking on not just on identifying what he or she needs to meet firm and client needs, but on how to implement the strategy.

The Coaching Model below outlines a five-step problem solving process. The use of open-ended questions is the hallmark of a coaching style of communication.
forgotten step, but it is important to ensure alignment regarding the plan and the schedule.

- **Follow Up.** Ask open-ended questions to help your colleague identify what worked, what didn't, and the opportunities for improvement. In this manner, accountability is a positive, supportive experience.

Here's what a conversation between Pat and Chris might sound like:

**Win-Win Steps 1 through 4:** Pat begins with, “Chris, on Tuesday I asked that you draft and share with me a complete analysis by the end of the day Thursday; you emailed it to me three days late, on Sunday night. It was not what we need. I am concerned that if you're unable to meet deadlines and provide a thorough analysis, we won’t be able to rely on you to satisfy the needs of our client, which is career limiting at best. Would you be willing help me understand what happened so that we can figure out how to fix this?”

Chris responds, “I know, but I had so much to do last week that I couldn't get to it until Saturday afternoon.

Pat says, “Tell me more.”

Chris responds again, “Well, I am not really sure what happened. On Tuesday, when we discussed the project, I was sure that I could turn to it that day. Then, Jamie emailed me from Europe with a ‘crisis project’ so, of course, I had to turn to that. Then Wednesday morning I realized I had never gotten Terry the memorandum I promised, so I hustled to finish that. In the meantime, the deal I am working on heated up, and I was here all night turning around documents and looking into issues. Thursday morning I really did intend to focus on the analysis, but Jamie got back to me with follow-up issues to work on, which I finished on Friday. By that time, I needed some sleep. So I started the analysis for you on Saturday, worked all night and then emailed it to you on Sunday.”

**Win-Win Inner loop of Awareness of Others:** Pat, not surprised by any of this, paraphrases, “It sounds as though you experienced a combination of bad timing compounded by a lack of organization. I would guess this was pretty stressful.”

Chris sheepishly nods and Pat asks, “Did you communicate any of what was going on to anyone you were working with or seek out advice from anyone?”

Chris, “Well, when I first started here one of the senior associates told me that it was career-ending to tell anyone that I had too much work – I'm just supposed to get it all done so that's what I did.”

Raising an eyebrow, Pat responds, “Really? Let me clarify the firm's expectations. First, yes, as a general matter, we expect you to work hard, but we also expect you to deliver on your obligations. Second, when your ability to deliver excellent work product is jeopardized on any one project, you need to let the person relying on you know. While you may have done the work, the analysis you provided me was not only late, but not what I needed. I've heard similar comments from Terry and Jamie. Our clients expect the best from us and we need to deliver the best. Does this make sense to you? Do you have any questions about our expectations?”

Chris responds, “I understand, but I don't know what I am supposed to do differently.”

Switching to The Coaching Model, Step 1: Establishing the Focus, Pat says, “That's what I want to focus on now. My goal is to help you come up with a strategy for ensuring that you consistently deliver excellent work product on time.”

Step 2: Brainstorm Options. Pat asks, “What do you think you could do differently?”

Chris responds, “Well, I don't know . . . I try to be organized. I think what threw me off this time was that I forgot about the memo for Terry. I don't know how that happened. I used to keep a list of everything I was working on . . . I am not sure when I stopped. So I guess if I kept a list that would work.”

Pat asks a few more open-ended questions to elicit Chris’ ideas on strategies for staying organized and then
says, “Let’s talk about your work quality. We’re concerned.”

Chris interrupts, “I know, I know. I am confident if stay organized that my work will be excellent. When I rush and am too tired the quality of my work suffers.”

Nodding, Pat moves on to Step 3: Create the Action Plan. “What will you do by when?” Chris responds with a list of tasks drawn from the brainstorming and a timeline for each task. Pat then asks, “What might get in the way of your success?”

Pausing to think, Chris says “I think the project list and weekly and daily planning are key. Maybe I need to put a reminder in my calendar for planning and then print out my list and mark it up rather than keep it electronically. Yeah, that’s it!”

Pat asks Chris to review the tasks, including due dates, and they agree to meet again in two weeks and then monthly to ensure Chris stays on track. Chris promises to come to Pat and the other partners before getting behind.

Using these communication tools, Pat gained an understanding of Chris’ challenges and further used Coaching Skills (i.e., opened-ended questions) to support Chris in developing a plan to remove the obstacles to success. The plan included follow-up to support success. Happily, Chris’ work product became consistently excellent and on time. Chris worked hard, wasn’t frazzled, and slept more.

**Conclusion**

If you’re a manager trying to successfully address performance issues, using *The Win-Win Conversation Model* and *The Coaching Model* gives the poor performer the best chance at turning things around. In the foregoing example, the employee modified work habits to achieve success. But what if the employee had continued to fail?

Notice how the manager clarified expectations and addressed misconceptions. Also notice that the manager worked with the employee to uncover and plan concrete steps for the employee to resolve obstacles to success. Given this collaborative approach, the employee likely feels respected and that the manager provided a real opportunity to succeed. Then, as long as you have also addressed any training needs, you’ve done all you can. If the employee is unable or unwilling to follow the plan, the employee will likely realize that the job is not a fit, resulting in a resignation or fairer-feeling termination, which is easier on everyone.

Many managers are often initially reluctant to try this approach. They’ve expressed concerns that “it wouldn’t work if the poorly performing employee didn’t want to change.” One such manager reports that:

“In just my short experience using this method, I have found that it is effective even in... a situation [in which an employee didn’t want to change]. In such case, I think the “would you be willing” question caused the person to realize that he did not want to change or do his part. That person chose to leave. In an odd way, I think facing that question was eye opening for the employee. In other cases, I think phrasing it as a question caused the problem employee to own his obligation to contribute to the solution.”

Consider using all or portions of *The Win-Win Conversation* any time you want to gain clarity with respect to the other person’s needs or raise a potentially difficult issue. Consider using all or portions of *The Coaching Model* anytime you want to foster buy-in or support your colleague in thinking creatively.

**About the Author**
Anne Collier is the founder of Arudia, an executive coaching and leadership development firm in the Washington, DC area. She is a board member of the Women’s Bar Associations of DC, a member of the ABA Law Practice Division’s Women Rainmakers and Productivity and Knowledge Strategy Committee, and a frequent author. Contact Anne on Twitter @stepintopower.
You know what you need to do, but your boss or someone else up the chain of command won't make a decision. Either he or she doesn't have time, doesn't understand, or doesn't care. Whatever the reason is, this person is frustrating you and makes you think it's time to polish your resume.

**Drano Is NOT Required: All You Need Is A Little Technique**

It's not that you have a problem with authority. You have a problem with incompetent authority. That is, when a person can't do his or her job, the person needs to work elsewhere. While this sounds great, it's hard to effectuate. And we're all about giving you actionable approaches to your people problems so wishing or griping is not the solution. The unfortunate truth is that those who are in your way, don't usually accommodate by leaving. The question then becomes, how do you eliminate the bottleneck without making the problem worse?
Five Steps to Transform Your Bottleneck Into Your “Best Bud”

Let me start by saying the answer is not just to be “nice” or go over this person’s head. It’s to be strategic.

1. **Build Trust:** You can’t work with a colleague who doesn’t trust you. Plain and simple. If you’ve alienated this person, you need to build the relationship. It’s not just about bringing in bagels, but food and drink go a long way toward building relationships and trust.

2. **Ditch the Attitude:** Let’s face it, if you don’t respect this colleague, he or she probably knows it. And, I am guessing, the thought of being an inauthentic sycophant turns your stomach. Instead, find something you respect about your colleague or empathize. Perhaps, he or she is merely overworked and isn’t trying to ruin your life.

3. **Uncover Goals and Concerns:** Before you can rush into proposing a solution, you need to understand a bit about your colleague's goals and concerns with regard to the bottlenecked project. Do so by using Coaching Skills, that is, asking targeted open-ended questions to elicit your colleague’s goals and concerns with regard to the project.

4. **Be Clever:** Take what you’ve heard in Step 3 and figure out what would meet both your colleague’s and your needs. Ta-da!

5. **Make It His/Her Idea:** This is where you get your colleague to choose your solution. It's not (quite) a ninja mind trick but it will require you to think on your feet and maintain your composure. *Delivery is key.* Offer the solution you devised in Step 4, not as your own, but as your colleague's by stating, “Hmmm . . . it sounds like you’re suggesting that we . . . .” And then pause. Wait for affirmation. If you don't quite get it, revert back to coaching so that you can uncover the resistance.

If you want to learn more about how to eliminate bottlenecks and you're in the DC area, join me on **March 9 for Tactical Leadership Skills**, register here.

If you found this post useful, please share with your colleagues and friends and let us know what you've done to eliminate bottlenecks. You can reach me at anne@arudia.com or 202-449-9751

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You are great at what you do! So great, in fact, that you've been promoted to manage your former peers (the subject of an upcoming blog post). There's just one problem: You are overwhelmed because you are doing your old job in addition to managing others. And, you are concerned because, if being truly honest with yourself, you realize that you are the bottleneck and actually getting in the way. Where are those additional hours in the day?! How will you learn the necessary management skills?!

**The Answer Is Making the Transition, Not Giving Up Sleep**

You are on the treadmill, barely keeping up while you tell yourself that it will get easier. But how? Take a breath...you don't have to give up sleep to get it all done and succeed. Instead, you need to learn and implement the secrets to effective management.

**The Five Simple Steps to Stepping It Up as A Manager**
1. **Pause and Plan:** I wasn’t kidding when I said breathe. Most managers, (everyone, actually) forget to take the time to plan and prioritize. Do this yourself, with a mentor, or with your coach.

2. **Identify Your Role:** Be sure to identify your role and the role of individual direct reports with respect to each specific project. This will help you avoid digging into “doing”.

3. **Avoid Personally Focusing on Comfortable Tasks:** It’s time for you to stretch; you’ve just been promoted, so do not take on what’s easy or comfortable. That would be those *doer* tasks that you do so well, but aren’t in your current job description.

4. **Delegate Effectively:** This is the tricky part. You are very conscientious, hence the promotion, and are petrified that team members might drop the ball, and then everyone will think you’re a failure and shouldn’t have been promoted. Wrong!! You can effectively delegate using coaching skills (https://arudia.com/secret-amping-indispensability-executive-presence/) to ensure that you and your direct reports are on the same page regarding the tasks at hand and the expected outcomes. In particular, you will want to use coaching skills to ensure that your direct reports have a plan, have identified resources and needs, removed obstacles, and have clarity with respect to essential aspects of the tasks.

5. **Follow Up with Support:** Delegate doesn’t mean abdicate. You are still on the hook for the successful completion of the tasks (and you know it!). Have no fear! At the end of the initial delegation conversation, be sure to establish and schedule follow-up. This will ensure that you provide the support necessary to ensure success.

If you want to learn more about how to make the transition from “do-er” to manager, and you’re in the DC area, join me on: **March 9 for Tactical Leadership Skills**, register here (https://www.wgr.org/Leadership_Development).

If you found this post useful, please share with your colleagues and friends and let us know what you’ve done to make the transition from “do-er” to manager. You can reach me at anne@arudia.com (mailto:anne@arudia.com) or 202-449-9751.

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For the Leader in You

How to Supercharge Your Organization’s Performance

By Anne Collier
Posted on December 11, 2017

Many entrepreneurs and managers are frustrated because their staff members don't get the job done with a high degree of excellence and attention to detail. And they worry that little things like typos and the big things like not getting back to clients quickly enough will cost them their reputation and clients or promotions. Does this sound familiar?

Stop Making Single Biggest Mistake Leaders Make

Here's the problem: you hire someone, pay him, and expect him to do the job. You think he is an adult and he'll figure out how to get the work done. Wrong! You've just make the second biggest mistake leaders make: you have delegated the work without providing any guidance, training, or coaching. The biggest mistake is
micromanaging. And, you may not have clearly defined work-product expectations. Keep reading to learn how to supercharge your organization's performance, one employee at a time, without micromanaging.

Delegate, Check In, Repeat!

The process is quite simple and easy to execute. By using The Arudia Coaching Model as your guide, you will be able to effectively delegate, provide support while you develop your staff, avoid disappointing work product, all while saving yourself time and the headache of poor-quality work.

The coaching model below outlines a five-step problem-solving process; what makes it coaching is using open-ended questions at each step.

Delegate: To effectively delegate, follow these five steps:

1. **Establish the Focus** of the conversation, which means asking open-ended questions to clarify the topic, goal, and take away from the conversation. This step is often the most important because a problem well-defined is half solved. This is also the only step in which you will likely not ask questions, but instead start the delegation process by clearly defining the task, including the end product. The takeaway from the meeting will likely be defining the strategy, including the necessary support, for accomplishing the task.
2. **Brainstorm Options** to the challenge by asking your team member open-ended questions to identify strategies. It's critical for your team member to do his or her own thinking here. Wait to share suggestions.
3. **Create the Action Plan** is especially important for complex problems and for team members who garner comfort from working out detailed steps or get stuck easily.
4. **Remove Obstacles** and identify resources is often overlooked and is necessary to successfully execute the plan created in Step 3. Don’t forget it!
5. **Review & Commit** is often the most forgotten step, and, especially if your team member struggles to remember details and steps, is critical to ensuring that you and are on the same page with respect to who does what by when.

Check-In: Don't end the meeting at Step 5 without establishing when you will have your progress check-in meeting. Ask your team member when he’d like to check in, suggesting sooner if you think the timeframe is too long.

Repeat: Start the coaching process again to tackle and challenges and unforeseen resources needs.

If you want to read more about how to use coaching to delegate, download my article *Dealing with Underperformance*, published in the American Bar Association's Law Practice Today.

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The Tortoise And The Hare

BY ANNE COLLIER ON APRIL 14, 2016

This article is brought to you by the Knowledge Strategy Group of the Law Practice Division. To learn more about how to improve your client service and the economics of your practice, please join the group’s next free 30-minute webinar, How to (Re)start a Practice Efficiency Program, to be broadcast at noon Eastern time on April 28, 2016. Read the program description and register here. This webinar will explain how to learn what efficiency improvements are most needed and how to prioritize your implementation of changes.

The tension in an organization struggling with change boils down to this: the change either goes too far or not far enough. The story below illustrates this problem, and the analysis that follows suggests how a firm leader may successfully address it.

Meet the Tortoise and the Hare
Terry, the M&A practice group chair, looks up from his desk just as Jamie barges into his office, fuming, "I can't believe it! You want us to start using checklists for every merger? What a colossal waste of time! You don't think I know how to close a deal? I've been doing this for a decade longer than anyone else here. Who's going to draft the checklist? How are you going to ensure it touches on everything? And, what if we create this checklist and it somehow gets on the internet? We'll look ridiculous; people will think we don't know how to practice law!"

That same day, at the M&A group lunch, Bailey, a lateral partner, sniggers, "I can't believe you're just now creating a deal checklist. If we're really striving to be cutting edge and efficient, we've got to change a lot—profiling our matters so that everyone can find what they need instead of reinventing the wheel. At my old firm, we did that and managed to increase our profits per partner by value billing. Not only did we save time working with our existing clients, but also more clients hired us because we produced higher-quality work at a lower cost."

As Bailey touts the benefits of a knowledge management system, Jamie walks in and protests, "That's the most ridiculous thing I've ever heard. I am skeptical we can even get a merger checklist right; how can you expect to properly profile all our matters? It's more work than it's worth!"

Bailey replies, "Jamie, sure, the checklists won't be perfect, but even with the imperfections they save a lot of time and are great tools for the more junior lawyers. Over time, people get used to using the system and the system evolves to become more efficient. But hey, we're not even there yet; we're still in the stone ages, BC - before checklists."

Terry overhears the conversation, thinking about how to get everyone to accept the checklist and, more importantly, the fact and pace of change. Why are Jamie and Bailey reacting so differently to the change?

"Who knew that change and thinking about change could be so complicated?" Terry thinks aloud. Even if the change is one we advocate for, embrace and want, it can cause stress. Terry knows that Jamie and Bailey want the firm to be more efficient and attractive to clients, laterals and associate hires; the rub is that neither will align with whether, how and how fast the group is implementing its knowledge management strategy.

**Understand the Tortoise and the Hare**

Here's what's happening: you are either the agent of change or change happens to you. You are the agent of change when you take a new job, move up the ranks, take on new responsibility, or embrace and work to implement a knowledge management strategy such as a checklist system. Change happens to you when the market for your services crashes and you are made redundant, your firm's business model morphs, or new leadership brings new visions and work practices that you don't much care for, such as a checklist system.

Bridges' Model explains transition.

Regardless of whether you are the agent or victim of change, the experience of change can be brutal. A noted organizational consultant, William Bridges, described in 1991 what happens in people's minds during the three stages of change and the corresponding emotions (referred to as 'Bridges' Transition Model'):

- **Stage 1: Ending, Losing, and Letting Go.** Resistance and emotional upheaval mark this stage. Even when you embrace change, you will experience this stage, if only for a very short time.
- **Stage 2: The Neutral Zone.** This stage is spaced between the old and new; people hold on to the old way, but are trying to adapt to the new way. People can experience resentment and low productivity.
- **Stage 3: The New Beginning.** During this stage people embrace change and are excited about it. They experience early wins and productivity gains.

Cognitive theory helps explain differing reactions to change.

The intensity and speed with which a lawyer moves through the three stages depends on a number of factors, including the lawyer's problem-solving style. A well-regarded model of problem-solving style was...
developed by psychologist Michael Kirton, known as Adaption-Innovation Theory (A-I Theory). The model posits a continuum between two styles – adaptive and innovative. It describes how one deals with the paradox of structure, which is the seemingly incongruent notion that structure both enables and limits problem solving. Kirton developed a series of standardized questions, known as the Kirton Adaption-Innovation Inventory (KAI), to determine where people fall within the continuum.

Apply the theories to law firm change.

Under A-I Theory, the preferred problem-solving style of people who are more adaptive is to leverage the system in place, as-is, to solve problems. The type of change they advocate for are improvements; they want to make the current system better. They are also risk averse, because they don’t want to damage the current system, and require a high degree of structure to be comfortable solving problems.

People who are more innovative prefer the efficiency and flexibility of devising a solution, and then modifying or replacing the system or process to accommodate that solution. They are also less risk averse and more interested in trying something different than their more adaptive colleagues. The tension at the law firm in the story is between lawyers who are more adaptive like Jamie, the senior practitioner, who believes the checklist change goes too far, and those who are more innovative like Bailey, the lateral, who believes the checklist does not go far enough.

Under Bridges’ Model, so-called resisters—like Jamie—resist because they’re still in Stage 1 and are likely experiencing fear, denial, anger, sadness, disorientation, frustration, uncertainty or a sense of loss. Consider also that the more adaptive strive to solve problems caused by the change by working out every detail to a very specific degree, and emergent problem solving and trial and error are not strengths of the more adaptive. This means that any change that is more than a mere refinement of the current system would entail working out all of the details before launching the new system. This is exactly what Jamie, who is upset and concerned, complains about.

The bell curve below represents the distribution of problem-solving styles, and shows that most people are not on either end of the spectrum. Most people prefer both improving and jettisoning the current system in moderation.

![Bell Curve Image]

When it comes to a radical change (and remember, whether the change is radical is in the eye of the beholder), the more adaptive are likely to resist, and the innovative are more likely to advocate for it. Similarly, when it comes to tweaking or perfecting the current system, the more adaptive are more likely to advocate and the more innovative will resist because the change doesn’t go far enough.

Because most law firms consider or implement changes that require a problem-solving style that is more innovative than many of their lawyers’ problem-solving styles, firms experience resistance from the more adaptive, who are the ones who spend more time in Stage 1; complaints and upset are the evidence.

Coopting The Tortoise and The Hare
Change the style of the conversation.

To successfully manage change, don’t criticize colleagues who seem to be slowing the process down. Instead, support them by empathizing, communicating openly, and leveraging their perspective. Remember, so-called resisters resist because they’re likely experiencing fear, denial, anger, sadness, disorientation, frustration, uncertainty, or a sense of loss. This doesn’t mean they are not making valid points, however.

Be sure to listen for the essence of your colleague’s feelings and needs, and follow the Win-Win Conversation Model, which I developed in response to clients’ needs to have more productive conversations when resolving issues likely to elicit defensiveness and upset. At Win-Win’s foundation is the paradigm shift from scrutinizing issues in terms of good-versus-bad to a needs-focused analysis. This means that rather than assess whether Jamie’s concerns are right or wrong, Terry needs to listen for Jamie’s feelings and needs to develop a strategy that meets both the firm’s needs for achieving greater efficiency and efficacy and Jamie’s needs. In this manner Terry will achieve alignment.

To have a Win-Win Conversation follow the model below:

- **Step 1: State the Facts** neutrally and without judgment. This means stating the facts very concisely and avoiding loaded words such as “should” while maintaining a matter-of-fact demeanor and tone.
- **Step 2: Be Aware of and State Feelings** as you deem necessary. Feelings such as concern and frustration are common and generally considered acceptable in the workplace.
- **Step 3: Be Aware of (and State) Needs** as necessary. It’s important to distinguish between needs the range of strategies that might satisfy those needs.
- **Step 4: Make a Request** using the “magic” language, “would you be willing to…?” The phrase is effective because it is clearly a request, as distinguished from a demand, as is thus more likely to foster collaboration and alignment.
- **Step 5: Agree on Strategy** by working through details such as deadlines, resource needs, and the like.

At its foundation, Win-Win requires you to distinguish between goal and strategy, be aware of your own and other’s feelings and needs on the matter, and to work towards a strategy that meets all needs. In implementing change, be sure to distinguish between goals and strategy, getting alignment on the former first. It’s easier to work through a challenge when you start with agreement on something. Remember, if a lawyer resists a change citing implementation difficulties or that the result won’t be perfect enough, your colleague is likely still in Stage 1. This is because your colleague is more adaptive than the style of problem-solving best suited to managing the change, meaning that the change requires a greater paradigm shift than
the lawyer's preferred problem-solving style.

**Use coaching skills.**

When it comes to supporting the lawyer in implementing the change, also use Coaching Skills, which is the use of open-ended questions to collaboratively identify a solution that meets that lawyer's needs. Think about it: if a colleague resists a change and all you do is reiterate how great the change is, you're not going to achieve alignment. If, on the other hand, you're using Coaching Skills along with Win-Win, you are more likely to achieve buy-in, and leverage your colleague’s best thinking not just on meeting his or her needs, but on how to implement change more effectively and with less stress for all.

The coaching model below outlines a five-step problem solving process. The use of open-ended questions is the hallmark of a coaching style of communication.

- **Step 1: Establish the Focus** of the conversation, which means asking open-ended questions to clarify the topic, goal and takeaway for the conversation. This is the one step of the model for which a leader might establish the focus by stating it him or herself.
- **Step 2: Brainstorm Options.** Ask open-ended questions to support your colleague in identifying options.
- **Step 3: Create the Action Plan.** Ask open-ended questions to support your colleague in developing an action plan. This step is particularly important for colleagues who, like Jamie, garner comfort from working out detailed steps.
- **Step 4: Remove Obstacles.** Ask open-ended questions to support your colleague in identifying challenges to successfully execute the plan created in Step 3.
- **Step 5: Review & Commit.** Ask open-ended questions to support your colleague in reviewing and committing to what he or she will do, by when and establish follow up. This is the most forgotten step, but it is important to ensure everyone is on the same page.
- **Follow Up.** Ask open-ended questions to support your colleague in establishing what worked, what didn’t, and what the opportunities for improvement are. In this manner, accountability is a positive, supportive experience.

Here's what a conversation between Terry and Jamie might sound like:

**Win-Win Steps 1 through 4:** Terry begins with, "Jamie, this morning when you stopped by to raise issues with our proposed checklist system, I was concerned; the fact you feel so strongly gives me pause—I don’t want to overlook anything critical. Would you be willing to share more detail about your concerns?"

Jamie responds, "Thanks Terry. I appreciate that you aren’t letting this be another ‘have-to’ program designed in a vacuum. I have a number of concerns, the biggest of which is that the checklist will end up being a
broken crutch—doing more bad than good. I don’t want the more junior lawyers to turn off their brains and fully rely on a checklist. I can just hear it now, “But I used the checklist…” as an excuse. That’s unacceptable to me and our clients certainly won’t accept it!”

Win-Win Inner Loop of Awareness of Others: Terry says, “It sounds as though your real concern is that the quality of work will decline rather than improve, at least from the more junior lawyers.”

Nodding, Jaime says, “You got it. I can just see the associates using the checklist as an excuse. That’s just unacceptable!”

Switching to Coaching Skills and following the 5 Steps to Coach in the Workplace, Terry asks, “What would you like to see happen?”

Jamie, softening, responds, “Well, I am not saying the checklist is completely harebrained, not only does the checklist have to be very thorough, but lawyers need to be trained to use it properly. I’d like to be comfortable the checklist is a tool, not a broken crutch. We have to make sure that it improves our work.”

Further honing the focus on their conversation and then using Step 2: Brainstorm Options, Terry says, “I couldn’t agree more. Let’s come up with a strategy for ensuring that the checklist works. What do you think we need to do here?” Notice Terry’s use of the pronoun “we” to further engage Jamie in the process.

Pausing to think, Jamie then adamantly suggests, “We need to pilot whatever we do, which has to include a serious vetting by everyone, including our risk-management carrier.”

Terry asks several more open-ended questions, which Jamie answers with increasing interest and intensity. Using Win-Win Step 4: Make A Request, Terry asks, “Would you be willing to lead our efforts?”

Jaime responds, “Yes, but only if you give me the time to do this right.”

Delighted and relieved, Terry, using Step 3: Create the Action Plan, asks, “Great! What’s your first step?”

Jaime responds and they co-create the action plan.

To ensure that Jamie succeeds, Terry uses Step 4: Remove Barriers, asking, “What support and resources do you need from the firm?”

Jamie responds, “Believe it or not, I’d like to involve Bailey and several other lawyers at different levels. I need to leverage the different experience levels and perspectives.”

Using Step 5: Review and Commit, Terry says, “Done! Continue to think about what we can do to support you efforts. I can’t tell you how much I personally appreciate your willingness to take this one. Would you recap so I am sure I understand both the plan and your resource needs?”

Jaime happily reviews all that details on the plan, identifying a few more steps along the way.

Using these communication tools, Terry gained an understanding of the behavioral issues at play, having private conversations with Jamie and similarly-minded colleagues using coaching questions. Terry adapted the implementation of the checklists initiative to address the major concerns expressed—implementing it in a pilot and then phasing it in; making use of the checklists voluntary for a period; and bringing those most concerned into the drafting process to reassure them with a sense of ownership and control. He sought to convince colleagues that checklists are taken very seriously among M&A practitioners by arranging a presentation by the senior risk manager at the firm’s professional liability carrier illustrating problems that have occurred in M&A deals and why the carrier strongly favors checklists to address them. This effort required time, but as a result, the checklists project was able to move forward with the support—grudging in some cases but nonetheless real—of most of lawyers in the M&A group.
Conclusion

So, if you're a practice leader trying to lessen resistance—that is, help your colleague move through the stages of transition—be sure to listen for the essence of your colleague’s feelings and needs by using Win-Win and then engage in collaborative problem solving using Coaching Skills. Communicate a clear picture of the change’s benefits that you will provide the support necessary to successfully transition and thrive long term. Don’t forget to acknowledge difficulties and to take the time to explain the reasons for change. Authentic communication goes a long way toward moving people successfully through change.

Change happens and we all make the transition eventually. If we didn’t, how would we progress?

About the Author

Anne Collier is the founder of Arudia, an executive coaching and leadership development firm in the Washington, DC area. She is a board member of the Women’s Bar Associations of DC, a member of the ABA Law Practice Division’s Knowledge Strategy Group, and a frequent author. Follow Anne on Twitter @stepintopower.
Step into Power: Lead with Aplomb

For a firm to be successful, its leaders must create the circumstances for "1,000 flowers to bloom." As corny as this may sound, that is what great law-firm leaders do.

For a firm to be successful, its leaders must create the circumstances for “1,000 flowers to bloom.” As corny as this may sound, that is what great law-firm leaders do. More literally, it means providing the training and support necessary so that each lawyer thrives, delivering excellent client work and contributing positively to the firm's culture. Whether the law-firm leader is the managing partner, practice group chair, or a lawyer who manages others as part of a project, he or she needs to be able to get great results. The viability of the firm depends on it.

To achieve great results, a leader must transform a group of independent lawyers who, left to their own inclinations, will usually work in their own individual silos, into a team that focuses on common client goals. Getting superior results, unfortunately, is not as simple as merely assigning tasks to the various team members. It requires leaders to cultivate collaboration among the smart, independent thinkers who are typically quite skeptical and often lack the desire to work on teams. It requires lawyers to lead with aplomb, which means building trust, harnessing diverse ways of thinking and problem-solving, achieving commitment to goals, milestones, deadlines and so forth, embracing accountability in a manner that promotes learning over blame, and focusing on client goals. The visual representation of this model — The Arudia Collaborative Approach — also highlights a key aspect of collaboration: that a group of lawyers transforms itself into a true team. For a visual representation of this model, please see below. Also critical is the need to maintain teamwork by continual attention to each step. The danger is that a failure at any one step erodes the ability to achieve success at other steps.
When I counsel lawyers in my workshops, I offer the following tools:

1. The Arudia Win-Win Conversation Model

Best for transforming potentially difficult conversations, where there will likely be a “loser,” into an
opportunity instead. This model (see the graphic above) is particularly useful in situations in which your needs appear to be in opposition to the needs of another. Win-Win Conversations require you to shift perspective to solution orientation rather than blame orientation. Also of note is the importance of stating facts neutrally and without judgment to avoid triggering defensiveness; awareness of others; and making requests rather demands. To have a Win-Win Conversation follow the model:

**Step 1. State the Facts** neutrally and without judgment. This means stating the facts very concisely and avoiding loaded words such as “should” while maintaining a matter-of-fact demeanor and tone.

**Step 2. Be Aware of and State Feelings** as you deem necessary. Feelings such as concern and frustration are common and generally considered acceptable in the workplace. The key is to separate unpleasant feelings about a situation from the person who typically would be held responsible. Failure to do so can result in a blame game and detract from achieving client goals.

**Step 3. Be Aware of (and State) Needs** as necessary. It’s important to distinguish between needs and the range of strategies that might satisfy those needs. Leaders keep their eyes focused on goals and are not distracted by team members confusing their own strategy with the goal.

**Step 4. Make a Request** using the “magic” language, “Would you be willing to … ?” The phrase is effective because it is clearly a request, as distinguished from a demand. This is more likely to foster collaboration and alignment.

**Step 5. Agree on Strategy** by working through details such as deadlines, work product, and resource needs to avoid misunderstandings.

2. ‘Telling’ Is an Appropriate Communication Tool

This method is used to share expectations, needs, goals, new information, and training. Most people readily use this tool, and find it easy to do so.

3. The Arudia Coaching Model
The Arudia Coaching Model (see the graphic above) and Coaching Skills (the asking of one or more targeted, open-ended questions) are best for collaboratively solving problems, supporting a colleague’s best thinking, and engaging and empowering more junior lawyers as well as peers. The coaching model outlines a five-step problem-solving process. The use of open-ended questions at each step is the hallmark of coaching. Successful leaders follow the entire model or use targeted opened-ended questions as needed.

**Step 1: Establish the Focus** of the conversation, which means asking open-ended questions to clarify the topic, goal and takeaway for the conversation. This is the one step of the model where a leader is likely to establish the goal by stating it and making sure it is understood.

**Step 2: Brainstorm Options.** Ask open-ended questions to support a colleague in identifying options.

**Step 3: Create the Action Plan.** Again, ask open-ended questions to support a colleague in developing an action plan. This step is particularly important for colleagues who garner comfort from working out detailed steps.

**Step 4: Remove Obstacles.** Ask open-ended questions to support a colleague in identifying challenges to successfully executing the plan created in Step 3, on a timely basis.

**Step 5: Review & Commit.** Ask open-ended questions to support a colleague in reviewing and committing to what will be done, by whom, by when and establish a follow-up schedule. This is the most forgotten step, but it is important to ensure alignment regarding the plan and the schedule.

**Follow Up**

Ask open-ended questions to help a colleague identify what worked, what didn't, and the opportunities for improvement. In this manner, accountability is a positive, supportive experience.
There are a range of communication techniques between Telling and Coaching: offering advice, offering guidance, and making suggestions. Importantly, there are times, for example, when a leader will need to both advise and empower by transforming advice into a suggestion; this is a coach approach but not quite coaching."

Win-Win, Telling and Coaching Skills are all valuable tools for leading, collaborating, and solving problems. Your choice of tool(s) depends on your assessment of the pros and cons of using each tool (in part or in full) and your goals for the conversation. So why is it that leaders who lead with aplomb use these tools? It's because instead of merely reacting or hoping that “it'll work out,” great law-firm leaders set their team up for success by intentionally communicating in a manner that builds trust, harnesses diversity, achieves commitment, embraces accountability and focuses on goals.

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Anne Collier focuses on improving culture, collaboration, and communication in at law firms and other organizations. She is a frequent speaker and author, and created The Workplace Toolkit — Actionable Approaches To People Problems. Reach her at anne@arudia.com.

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