

Becoming a Trusted Advisor: An Exercise in Collaboration

Carolyn Bortner – Director of Lawyer Development, Orrick

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April Gallagher – Global Director, Avenues



Orrick's Need...

To introduce a program for Senior Associates that will best position them for success as Orrick partners.

Enhance our investment in Senior Associates, with a focus on developing skills in the following areas:

- Business acumen
- Project management
- Leading teams
- Expanding client relationships and business generation



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Orrick's Goal With Fullbridge

We wanted to help our Senior Associates contribute as strong, global business people and future leaders of our firm.

- to understand our clients' industries and business challenges; and
- to lead teams effectively, act as firm leaders, and interact with clients as trusted advisors

After extensive research in the market and consultation with colleagues at peer firms, we identified Fullbridge to be a cutting edge, industry leading program, that could help us meet our goals.

- focus on the skills and behaviors needed to succeed in the global business world
- instructional design that mirrors the way adults learn most effectively.



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Orrick's Plan

Management support and approval

- Backing of Chairman and Firm leaders

Creation of Steering Committee

- One partner from each Business Unit
- Worked closely with Lawyer Development and Fullbridge to get the content right

Roll out to PGLs and potential participants

- Presentation from Chairman and Firm Leaders with Fullbridge team
- Education about the program goals
- Creation of enthusiasm and buy-in
- Selection process



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Proposed Pilot

Limited number of Senior Associates

- invited all Senior Associates to express an interest in the program
- from those that expressed an interest, selected participants in consultation with PGLs



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The Fullbridge Pedagogy

Active Learning



- Readings & HD videos
- Case studies
- Self-guided tutorials
- Individual exercises

Team Collaboration



- Intensive team work with rotating leadership roles
- Project management theory and practice

Personalized Coaching



- Individualized feedback
- In-program support
- One-on-one coaching throughout the Program



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Learning platform

Easy navigation of Program content

Embedded videos and readings engage participants in the learning process

Rich graphics and visuals bring the content to life

Embedded tutorials, exercises and learning checks put learning into practice



Sample content page
ORRICK fp THE FULLBRIDGE PROGRAM

Simulated Work Environment

Sample daily schedule

Coach-led
Individually-led
Team-led

Morning Unit: 9am – 1pm



Afternoon Unit: 2pm – 6pm



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The Coach's Role



Instructor
Mentor
Manager/Client
Coach

Content discussions	At the start and end of each unit
Support and Q&A	During all Program hours
Scoring and feedback	Within two days of submission
One-on-one meetings	Beginning, middle, and end of Program
Team meetings and problem-solving	At start and through-out Team Project



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Executive, Client-Side Experience



Leah Dagher

BA, Randolph-Macon
Woman's College
MBA, William & Mary
Deloitte
Executive Coach



Matt Rubins

BS, Cornell
MBA, Harvard
VC, Investment
Banking



April Gallagher

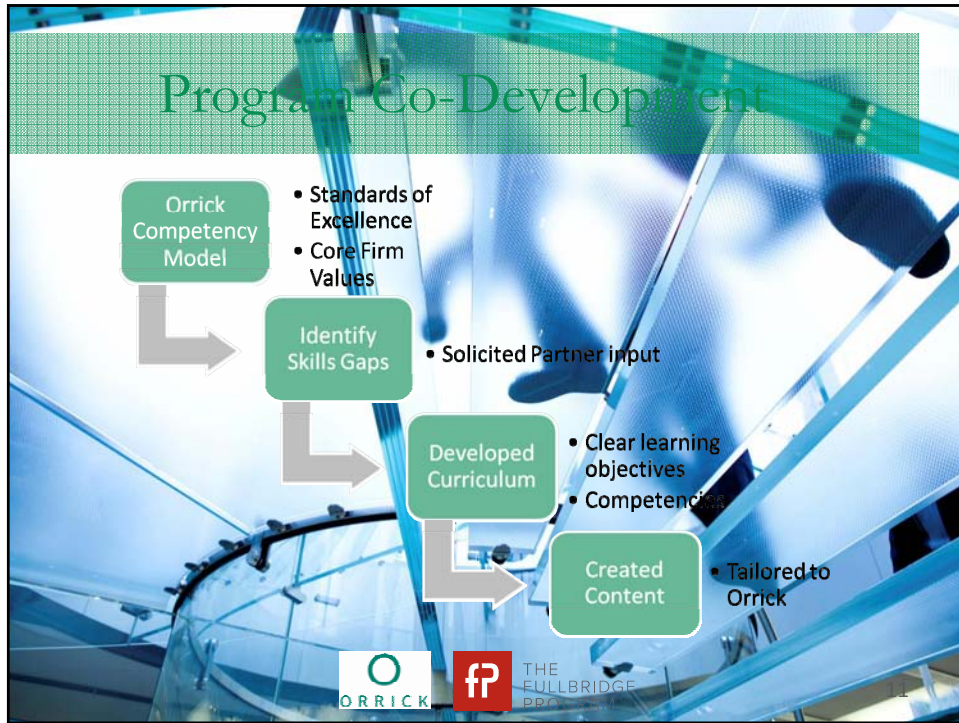
BA/BS Univ. of
Pennsylvania
MBA, Stanford
Bain, Senior BD
Executive



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THE FULLBRIDGE PROGRAM



Orrick Senior Associate Academy: Becoming A Trusted Advisor

Monday	Tuesday	Wednesday	Thursday	Friday	Monday	Tuesday
Live 2 Locations	Live 2 Locations	Remote	Remote	Remote	Live One Location	Live One Location
Orientation and Professional Development: Leadership Essentials	Business Analysis: Business Strategy in a Global Context	Financial Analysis: Income Statement & Balance Sheet	Financial Analysis: Financial Statement Analysis	Valuation: Discounted Cash Flows Analysis	Professional Development: Project Management & Feedback	Team Project: Presentation Development
Effective Presentation: Persuasive Communication	Professional Development: Relationship-building	Financial Analysis: Cash Flow Statement	Valuation: Free Cash Flow Forecasting	<i>Transactional</i> Valuation: Multiples & Capital Markets	Team Project: Project Analysis	Final Presentation
				<i>Litigation</i> Effective Presentation: Creating Compelling Presentations		Program Closing & Feedback

■ Professional Development
 ■ Business Analysis & Communication
 ■ Finance
 ■ Team Project

A Tailored Program

- Partner videos added relevance and participant buy-in
- Partner involvement throughout program



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Program Delivery: Keys to Success

As Participants:

- Clearing the Daytime Calendar
- Adapting to a Learning Environment
- Engagement: Content, Team, Coaches

As Coaches:

- Establishing Credibility and Trust
- Engaging Participants (and Partners)
- Involving in the Learning Process
- Adapting Real-Time



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In Their Words

- “The biggest takeaway is not really a technical skillbut more **of a message about how to think about clients** – not as a suppliers of the work that you are doing but as an entire business.”
- “One of the biggest takeaways for me is **the teamwork**. It was really great to get to know other associates. When the program is done you stay in touch with them.”
- “**You do a lot on presentations**...you actually videotape yourself and just seeing yourself on video is really helpful.”
- The final project is fun. You present to Orrick partners and **you get real feedback....”**

“...it’s an investment in yourself.”



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Post Program

- Participant Survey
 - A better understanding of their clients business concerns.
 - From that, a heightened confidence in client interactions.
 - Much better self-awareness.
 - Higher comfort level with project management.
 - Happiest with effective communication and Presentation skills.
 - Ancillary benefit is better internal relationships.
- Looked to Management Feedback
- Content Review and Revisions



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Questions?



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Table Exercise



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