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Strategic Networking: Making Your Contacts Count

Anne Baber and Lynne Waymon

Inside:

When we've asked attorneys attending our seminars and keynotes, "What's the dollar amount you'll spend this year on so-called 'networking' or client development activities?" we've heard everything from $75 to $875,000.

What about you? What will be your invest-ent in contact building activities this year? Include memberships, dues, trade shows, conferences, events, professional meetings, receptions, luncheons, golf outings, the annual holiday open house -- any activity where your purpose is to build relationships for increased business for you and the firm.

After people in our Networking Know-How workshops see the dollar amount they spend, they usually have one of two reac-tions. Some say, "Wow! I'm not spending nearly as much as others in my profession. No wonder I'm feeling like I'm behind the eight ball." Others say, "Whew! I never realized how much I was spending on this? Am I really getting my money's worth? What are my goals and how can I improve my return on investment?"

Whatever you spend, here are five tips to help you get your money's worth as you build relationships for professional growth and success.

1. **Don't say, "I'm too busy," or "I'm too bashful."**

Professional associations and trade groups are valuable places to meet prospective clients as well as to learn and grow with others in your field. Join a group of peers to meet people who've already solved the problems that are festering back on your desk. Get active in a trade group that serves your target market and you're sure to uncover new business. Make being active part of your strategic plan. Leverage your membership by choosing activities that help you meet people in ways that are comfortable for you, give you visibility, and showcase your character and competence. Follow the "netiquette" by learning the rules and tools for building professional relationships.

2. **Don't answer the often asked, "What do you do?" with a job category, job title, job jargon, or just the name of your firm.**

Make your answers short, snappy, memorable, jargon-free, interesting, and crystal clear. Give a talent (one of your many) and then show how you solved a problem, saved the day, or served the client. We might say, "At conventions, we show people how to get more business through networking. We just did a workshop on Networking Know-How for the Law Marketing Association." A lawyer in a recent seminar developed this answer: "I help businesses expand overseas. I just handled all the legal work for a pet food company that's started doing business in Denmark - we're experts so they were able

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open their stores 3 weeks early. I'm with Durkin, Jones & McCafferty [not the firm's real name] in Baltimore." Play up the problem you solve and don't just count on your firm's good name to bring you attention.

3. **When someone asks, "What's new?" don't ever say, "Not much. Same old thing. Been working really hard. . . Really tired. . ."**

Be prepared . . . to be spontaneous. You say you weren't born with the gift of gab? Think of topics ahead of time -- topics that you're eager to talk about because of who you are and where you've been and what you're looking for. Respond to "What's new?" with ideas, information, recent successes, and inquiries about resources you're looking for. In short, prepare an "agenda" so your small talk is smart talk.

4. **When you've forgotten someone's name, don't say, "I'm sorry. I can't remember your name."**

If you "blank" on a name, you've got three choices. Don't you often remember the topic you talked about, even though you can't recall the name? So say, "Great to see you again. How was your trip to Orlando?" Or give your name. Say, "Hi! I'm Susan Wentworth. We met at the reception." Or say with enthusiasm and warmth, "Hi. I remember you. Tell me your name again."

5. **Don't go for "cardboard connections" -- kidding yourself that you're "networking" just because you handed out 23 business cards.**

Pour your energy into making a conversational connection. Look for a reason to hand out your business card. As you listen, ask yourself what resources you have or people you know that you could introduce the other person to. When you "listen generously" you don't need excuses for asking for a business card and/or to re-connect -- you've got real reasons. "I'll send you that article on how to get the most from summer associates." Or "I'll e-mail you with Jill's name and address -- she'll be so fascinated to hear more about your work in Australia."

Whether you love it or hate it, were born with the gift of gab or just fake it, networking know-how is crucial to your success. With a little practice, you can make networking an art . . . not an accident.

Lynne Waymon *of Silver Spring, MD, and* ***Anne Baber*** *of Lenexa, KS, are business owners, keynote speakers, co-developers of the Self-Assessment of Strategic Networking Activities, a questionnaire that tests mastery of networking in 8 different areas, and coauthors of* Great Connections *and* 52 Ways To Re-Connect, Follow Up & Stay in Touch When You Don't Have Time To Network. *Call 1-800-352-2939 or visit www.ContactsCount.com to inquire about their seminars and discounts on bulk orders of books.*

Tracking Systems, Part 2: Maintaining Information on People

Dottie Palazzo

In the last issue, we discussed the process of determining the current and future needs of your organization and how a CLE tracking database can fulfill those needs. In the course of that process at my firm, we identified six major functions that we wanted from our system: maintenance of information on **People**; maintenance of information on **Programs**; maintenance of information on **State** CLE rules and regulations; a **Program Calendar** and online registration; a record of **CLE Credits** and attendance; and the ability to provide numerous **Reports**.

In this article we will cover the first function, **Maintenance of Information on People**.

The Benefits of Tracking Lawyers' CLE and Training

The primary people of concern are lawyers who are currently members or employees of your firm. The internal advantages of tracking continuing legal education and training for the lawyers in your firm range from ensuring compliance with state CLE requirements to monitoring activities in conjunction with your firm's professional development program. Those reasons alone are compelling enough to justify the work and expense of developing or purchasing a tracking system.

An added consideration is CLE program provider administrative responsibilities. All CLE states require CLE approved program sponsors to maintain records of those programs, including names of attendees and CLE credits earned. Length of retention varies according to the length of compliance period in each state. For example, a three-year compliance period state like California requires that records be kept for four years in order to allow for audit. That means that lawyers who leave the firm must remain on the system for a period of time. In addition, if your programs are approved in CLE states which require that outsiders be allowed to attend in-house programs, as we do in Ohio, you will have lawyers on your system who were never members or employees of your firm. We designate lawyers on our system as J or O. O's are lawyers not currently members or employees of our firm. When a firm lawyer terminates, all of his information remains on our system but he becomes an O.

What Data to Track and Why

No matter how long you determine you need to retain the information, the good news is that you really need an amazingly small amount of basic information on each lawyer in order to meet CLE provider requirements: the **lawyer's name**, the **state** or **states of admission**, and the attorney's **state identification number**. **States of admission** was pretty simple prior to New York going mandatory and instituting two different CLE requirements. In order to facilitate our tracking of New York bar members, we have adjusted the standard list of states to include two New Yorks, one designated NY for veterans and the other designated N1 for newly admitted lawyers who are subject to the newly admitted transitional requirement.

If you intend to assist firm lawyers with CLE compliance, you also need to know their **status of admission** in each state, i.e., active, inactive, exempt, etc., and their **exact date of admission**. The date of admission is used in some states to determine compliance groups and compliance periods, and to compute the proration of the requirement for some newly admitted lawyers. For some states, such as Texas and New York, the lawyer's **birth month** is also needed to determine the compliance period.

We also use our tracking system to manage firm training. For example, we run lists of lawyers by office, practice group, or status in the firm, i.e., partners or associates, which we use in order to determine who will participate in some training events. In order to do that, we include **title or status** in the firm, **practice group and/or practice area**, and **branch office** for each firm lawyer. These kinds of lists can also be used to determine in which states we need to apply for CLE credit in order to maximize the CLE credit available at any particular program.

We provide annual training reports to all firm lawyers. That requires that we record attendance at all training events, even those for which CLE credit is not provided. We also had the problem of how to record attendance for new hires who are not yet admitted in any state and for lawyers admitted in non-CLE states. We added state NA for "no state" to our list of states. Because this applies to all firm lawyers, the system automatically includes state NA for each firm lawyer and each program entered on our system. Any attendance not for CLE credit is recorded to state NA.

Very often, lawyers who have left the firm request a copy of their CLE records several months after their departure. Their recollection of what they did and when is often vague. We include the **hire date** and **termination date** for each firm lawyer. These dates establish the parameters for those reports.

Some of the information mentioned above may be "borrowed" from the firm's human resources system, thus minimizing the amount of data entry to your system. Inclusion of the firm's HRS identifier in your system allows that information to automatically display and remain current until the identifier is deleted. For an example of how that works on our system, see the screen shot at the end of this article.

Summary and Conclusion

We have covered a lot of information, so let's recap:

1. Basic Lawyer information needed to meet CLE provider requirements for firm lawyers and outsiders:

- Lawyer's name;
- State or states of admission; and
- State attorney identification number if applicable.

2. Additional Lawyer information needed to monitor CLE compliance for firm lawyers:

- Status of admission;
- Exact date of admission; and
- Birth month.

3. Lawyer information needed to facilitate management of firm training:

- Title or status in the firm;
- Practice group and/or practice area; and
- Branch office assignment.

4. Lastly, information needed to establish parameters for reports for terminated lawyers:

- Hire date; and
- Termination date.

This is truly an amazingly small amount of information. Once entered, most of it remains applicable forever. But properly maintained, this information provides a good foundation for your database and can be used in a variety of ways.

What's Next

In the previous article, I mentioned that the status or activity report we wanted to be able to provide gave direction to our database. The next article in this series will focus on the design and content of that report, the reasons for that design and content, and a comment on how well it meets those needs.

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Spring Semester Law School Courses

If you're not in a hurry for the information, there's no better way than a law school course to get up to speed in a new area of law. Seven area law schools permit practicing attorneys to take courses as non-degree students, on a space-available basis after all degree students have been accommodated. Only George Mason and UDC, for lack of space, do not accept non-degree students.

If you want CLE credit for a law school course, you'll probably have to apply for the credit yourself, since the law schools are not generally set up to do it for you.

The following chart gives additional information provided by the schools.

*(**Editor's Note:** This column highlights best practices and new approaches to common challenges of in-house training managers. We invite your comments and your suggestions for future articles. You can reach us at (703) 719-7030 or maraeg@profdev.com.)*

Skills Training

Any time we want to learn *how to do* something, as opposed simply to learning *about* something, we need to do more than just hear or read an explanation. We have to try it out and gradually get better at it. A good model for producing that kind of learning – of performance skill as opposed to intellectual knowledge – is the "Know/Show/Do/Review" instructional process that is used in the best trial skills training programs.

"Know/Show/Do/Review" is a training model that was developed by the military in World War II, when thousands of draftees had to be quickly trained for their new posts. It is as useful – and as used – today as it was then, whether we are conducting a group training session or coaching a subordinate on the job. Here are the component steps:

1. **Know:** *Explain (a) the knowledge base underlying the skill* (in deposition skills training, for example, you might explain the purpose of depositions and where they fit into an overall discovery strategy) and *(b) how the skill is performed* – its component steps, what they should accomplish, how to tell whether they have been performed properly. Usually this is best accomplished with a combination of lecture/discussion, visual aids (process flow-charts, for example), and more in-depth reading material. Unfortunately, many so-called "skills training" programs begin and end with this step.

2. **Show:** *Demonstrate and discuss the performance of the skill.* In the case of observable skills such as taking testimony or negotiating an agreement, this can be done in one or more live or videotaped role plays or by attendance at an actual trial or negotiation, with accompanying discussion and evaluation of the performance. In the case of writing or other internal mental skills, examples of the work product resulting from the performance can be shown, along with a discussion of how they were produced and how well they accomplish their intended purpose. In either case, it's especially helpful to show both poor performance that illustrates common mistakes and model performance that exemplifies the standard to be achieved.

3. **Do:** *Provide opportunities for the learner to practice the skill,* such as role plays, other practice exercises, rehearsals for real-world performance, or actual performance on the job. Here and in all the preceding steps, it's best to proceed incrementally, building and solidifying basic skills before moving on to more complex ones. In good trial skills training, for example, participants will make opening statements, take direct testimony, make objections to the other side's testimony, and so forth, one at a time in separate training modules, before putting all the skills together in planning and conducting a mock trial at the end of the program.

4. **Review:** *Critique the learner's performance.* The critiquer should observe the practice session without interrupting and take notes of the learner's specific behaviors and their results. In the critiquing session, the critiquer should be sure to reinforce what the learner did well besides pointing out what could have been done better. It's also important not to overwhelm the learner with more information than he or she can use. For best results, the critiquer should focus on only about three major points. The finer points can be saved for future review sessions after the learner builds skill and confidence in the basics.

   With observable skills like oral presentations, video- or audiotaping the performance can greatly enhance the critique: The tape allows the critiquer to illustrate his or her points in very concrete and powerful fashion; it also permits the learner to observe his or her own performance during the critiquing session and, if given the tape, to review it again afterward.

As we've indicated, "Know/Show/Do/Review" can be used to design a group training session or to coach someone on the job. In the latter context, a mentor or supervisor has only to add a few extra steps (typically Steps 1 and 4, "Know" and "Review") to what he and the subordinate are already doing in the course of their regular work to provide a superior learning experience.

"Know/Show/Do/Review" can also be used to evaluate the effectiveness of training offered by outside vendors –

to make sure, for example, that there are adequate opportunities for training participants to practice incrementally and to be critiqued individually on the skills being taught (or that the firm follows up the training by providing such opportunities on the job). "Know" or "Know/Show" alone won't do it.

The "natural trainers" among your lawyers are probably already instinctively using "Know/Show/Do/Review" to bring along the skills of their subordinates and mentees. Teaching those four steps to your other lawyers, and making sure they are the foundation for all your skills training courses, will pay big dividends with just a little extra effort.

– Gaye Mara