This Month

- **The importance of understanding people and benefits**
- **Ease of access to MI/BI**
- **Taxation gifts – added ROI**

Who are we and those we are speaking to for empathy?

It is so important that we have a clear understanding of the personality profiles of our people because despite technical skill levels we need to be able to manage teams working together at every level for business success and succession planning that works.

When we are recruiting people, we have to consider beyond them being “n”years PQE and billing “n” £s per annum. So, it’s not just about a job profile and accountabilities.

That candidate profile is very important considering not only what is needed now but going forward contributing to performance, strategy, workplace and client experience

- Communications Skills – able to write, able to present, able to socialize with affinity, able to ask the right questions
- Intellectual Skills – able to translate the answers to questions of colleagues and clients and respond with a relevant proposal
- Management Skills – either the ability to run a team or the ability to manage own time and projects
- Motivational Factors – what are the turn-ons for maximum performance, finance, recognition as a number one
- Emotional Factors – is the personal work:life balance suitable for the job demands

This profiling should not just be exercised at the time of recruitment but also within internal regular appraisals and assessments. If people are falling short of the needs maybe it is time for a job role change – often top techies or lawyers are focused and selfish and should not be managing others who are expecting some shared time. Some more advanced firms do spend time on this kind of analysis and generate personal development programmes to cure and/or improve.

Recently I have had the pleasure of meeting with Peter Coop www.petecoop.com a business improvement consultant and as a result I now know that it is just not internal assessments that are needed but also an awareness of our personality and communication style.

For example, when you are meeting a potential client – whether it be different managers in a commercial business or indeed private clients, whoever is communicating with them is aware of their style and adapts in order to gain empathy, win the business or satisfy the client. It is those communication and intellectual skills referenced earlier

There is a process out there in the market called DISC – This enables with simple profiling the categorisation against four styles - Dominance, Influence, Steadiness, Compliance and if so, what is the best way to communicate with them. How do we understand their issues, identify and present our solution, demonstrate the benefits and return and get the ok to proceed?

Would we use the same approach when trying to empathise and produce a solution to Richard Branson, Bill Gates, Bill Clinton or David Beckham?

Dominance

Profile – decisive and tough, goal orientated, gets things done now, likes control and power

Communicate – Solutions not problems, bullet points not detail, be direct

Under pressure – lack of concern - Fear – loss of control

Influencer

Profile – persuasive, optimistic, talkative, people oriented

Communicate – be friendly and optimistic, ask their opinion, compliment them

Under pressure – disorganised - Fear – Social rejection

Steadiness

Profile – Good listener, calm, careful, patient, modest

Communicate – be reliable and build trust, provide assurance, don't pressurise for quick decisions

Under pressure – too willing – Fear loss of stability

Compliance

Profile – Precise, follows rules, needs data and information, analytical

Communicate – Provide data and facts, allow time for decisions, respect their expertise, expect questions

Under pressure – overly critical – Fear – criticism of work

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This type of analysis and subsequent coaching enhance communication and management for maximum effect. What does this all mean – particularly when dealing with a client or prospect or even different people and teams within our own organisation.

Internally we are enhancing management, performance and team-work and adding to our appraisal system and people development activity and externally ……………….

Use your communication and intellectual skills on how to approach – gather the right data and then present the right solution whether it be a face-to-face initial meeting, a proposal meeting or even a written formal proposal. The structure of the first few pages is critical to win the deal – contacts, SLAs and the like can be appendices

Years ago, I won a $600k software deal in the USA in just 10 minutes of meeting a financial institution for the first time – not even a demonstration

MI & BI

In my November article about essential actions November2022.pdf (professionalchoiceconsultancy.com) I referenced the very importance at the moment of availability of essential MI/BI to in some cases assist survival and in others really achieve objectives. Shortage of the right MI and BI does not mean that firms have to go through the distress of changing their PMS/CMS systems or indeed relying on staff generating Excel reports with consistency and sharing.

Yes, you certainly need the information but just like client on boarding and client communication there are added value solutions available. This video produced by Katchr https://katchr.com/blog/law-firm-risk-its-all-in-the-data/ goes someway to enhance the management perspective.

Tax Credits for R&D – enhanced ROI

Over the last months there has been frequent comment on the need for law firms to work on installing added value solutions for business performance and client satisfaction – many of the needs at a level not included as yet within all PMS/CMS systems. Areas such as enquiry conversions, on boarding, client communications as files progress, management information and business intelligence. There are products available but to integrate fully with existing systems and to have the definition defined by the firm bespoke customisation is required.

What it does mean however, if you are a limited company, is that there is tax relief available for the costs of the activity. I have had recent discussions with Andrew Hague AHague@wrpartners.co.uk of accountants www.wrpartners.co.uk and can confirm it is not just the cost of the software solution that can be recovered but staff and management time (salaries and pension contribution), (specifying, testing), external consultants and AI advisers and developers, utilities, computers, cloud computing.

It will mean a little more discipline and managing projects and recording time but well worth it and something, again we should be doing anyway.

More to follow on this topic and maybe with some case studies.

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