

Professional Coaching For Attorneys: A Primer

By Bonnie J. Montgomery, Ph.D

Lawyers should be aware of the benefits of professional coaching. Coaching has been widely used in business for more than a decade. Major companies collectively spend over one billion dollars annually on coaching. Why? It improves the bottom line of the business. Organizational coaching can better focus the efforts of managers on the strategic business objectives of the company. Professional coaching can improve job satisfaction and performance of individual employees.

Lawyers face many of the same challenges and pressures as business executives. Law practice at its best can be intellectually challenging, and personally and professionally rewarding. In attorney and author Scott Turow's felicitous phrase, lawyers can "do well and do good at the same time." The reality of law practice usually differs from that ideal. Many law firms must reinvent themselves and execute new strategies to remain successful. Lawyers generally face relentless billable hour pressures. Demanding and unappreciative clients may have unrealistic expectations about what their lawyer can do for them. Balancing personal and professional goals may be frustrating. Working constantly in an adversarial system brings its own unique demands not faced by other professionals. As a result, satisfaction with law practice can suffer.

Women attorneys often are disproportionately impacted by these professional pressures. In addition to the usual demands of a successful practice, they often deal with starting a family, child rearing and sometimes care giving for elderly family members. Many women with successful practices face recurring questions. "How can I grow my practice and create better alignment between the efforts of my partners and associates and the goals of my firm?" "How can I improve my own performance and my satisfaction with law practice when I have too little time for myself and my family?"

Coaching can be useful in answering these questions. What is professional coaching, what can it do and how does it work?

Defining coaching with precision is as difficult as defining "lawyering." Lawyers advise, resolve conflicts, draft documents, conduct transactions, advocate and communicate. Like lawyering, coaching does not involve a single task. Professional coaching generally involves a one-on-one professional relationship to assist the coaching client in professional or personal growth. The client may be the law firm itself, in need of organizational coaching to address professional issues affecting the entire firm. New associates, for example, may in general not have the necessary interpersonal skills necessary to communicate effectively with clients. More often, the coaching client is an individual attorney. With individuals the emphasis may be on both professional and personal growth. Professional coaching here is tailored to the individual client and her circumstances and not to the needs of the firm.

Professional coaching is a tool to help a client increase self-awareness and in doing so, identify strengths and weaknesses. This leads to better utilization of strengths to increase professional performance, a renewed sense of purpose and increased personal satisfaction.

Professional coaching is not consulting, although there is some overlap. A consultant often has a technique for focusing business strategy or increasing professional performance which can be used by any organization or individual. A consultative approach may not be as individualized as a coaching approach. Coaching is not therapy. Coaching is forward looking with a focus on increasing performance and satisfaction. Therapy often deals with past problems and with their diagnosis and treatment.

Professional coaching is useful in many areas. It can help professionals such as attorneys improve their performance and develop their potential. Coaching assists in using emotional intelligence skills for better self-management and enhanced leadership skills. It can identify personality traits and work habits which either help or hinder professional development. It can improve work performance by

recognizing “blind spots” and overcoming internal blocks which limit potential. At the personal level coaching can develop stress resilience, assist career reinvention, rekindle passion in work and achieve a better balance between career and personal life.

Professional coaching works through a multi-step process that may take from three months to a year. It usually involves face to face discussion and regular telephone and e-mail contacts. How the coaching process works can be illustrated by a hypothetical professional coaching client.

Sarah is a successful practicing attorney in a mid-size firm. She directs the firm’s commercial litigation team. Sarah is in her early 50’s with grown, independent children and a husband who is a financial planner. Sara’s father was a successful solo practitioner who devoted considerable time to mentoring young attorneys. Her grandparents had a small family business and her mother was a teacher. Both her mother and grandmother were strong women who believed the best approach was to work behind the scenes to get things done and to do things yourself so they would be done right. Their way was to keep a low profile, exert influence quietly and lead by example. Sarah, too, has always believed she should do things herself and not rely too much on others. It worked in law school to get good grades and it has worked in practice where she has a good reputation for getting things right the first time. But Sarah increasingly is not finding law practice as satisfying as it once was and her frustrations as a team leader are growing. She is an excellent writer and wants to pursue that but has no time and no outlet for it.

The first step in the coaching process for Sarah and her professional coach is determining Sarah’s goals and objectives through an intensive interview. Often the coach will use assessment tools such as the Myers-Briggs Type Indicator or a 360 degree survey to gather information anonymously from peers, supervisors, direct reports and sometimes even friends and family. This is essential information. Sarah may not have an accurate perception of how others see her. She may not be aware of weaknesses that are limiting her effectiveness or even of her real strengths. A good professional development process in a law firm could bring these things out but many firms do an inadequate job in this area. The first step in the process is important in establishing a successful coaching relationship. Building an environment of trust is essential.

Information from this first step helps to establish the coaching agenda. These are the goals that Sarah wants to focus on.

The second stage in the process builds on the information gathered in the first stage. Blocks that have stopped the client from best utilizing her strengths can be identified. These often come from “old messages” from family or even a person’s “winning strategy”— the strategy which has helped them succeed so far. Sometimes that winning strategy has unintended results which have hindered goal achievement. In Sarah’s case, both may be operating. Sarah’s winning strategy of “do it yourself” is having an unintended result. As a team leader, she doesn’t delegate effectively, leading to dissatisfaction among her team members, increased time demands on Sarah and lowered team productivity. All this is contributing to Sarah’s decreased satisfaction with her practice. Without the coaching process, Sarah may not have figured out what was going on. The associates on her team would not be direct with her and other partners would not know enough to make the connection between Sarah’s strong work ethic – her winning strategy – and the problems and frustrations coming from her dislike of delegation.

Blocks also may be coming from the “old messages” Sarah received from family. Working behind the scenes and keeping a low profile, valuable though they may have been to Sarah, may now be blocking Sarah from pursuing more visible strategies to pursue her ambitions to write.

Sometimes other things surface in this phase of the coaching process. Negative experiences from the past, including past work experiences, previous relationships and family issues can undermine the client’s confidence in moving forward, and utilizing her strengths. If this is the case, it may be helpful to take a step back and gain perspective so that old messages from the past do not limit people in the present. In some cases, if the past reveals deep anger or wounds which seem to be paralyzing the client, therapy and not coaching may be needed initially. A coach who can recognize the difference is valuable.

Step three in the coaching process is to set manageable stretch goals, written and measurable. Coach and client will often develop a contract for the specific goals to be achieved. As part of the contract, specific practice assignments and other techniques may be designed to help the client reach her goals. For Sarah, personnel training in team manage-

ment, including how to delegate effectively, may be useful. A commitment by Sarah to identify writing opportunities, perhaps in local or state bar journals and a further commitment to begin a writing project will move Sarah toward meeting the desire to write.

The fourth step is working the process which has been put in place. The client may find that in attempting to achieve sustainable behavioral change, things shift and aspirations change. The coaching process must be dynamic instead of linear and adjusted as necessary.

The final step is monitoring and assessment of progress by the coach. Mutual agreement that goals have been achieved or that a change in the coaching plan is needed are always necessary. In Sarah's case, she and her coach agree that the self awareness she has gained and the changes she has made in the last six months have made her a more effective lawyer and have increased her satisfaction with law practice. She has writing projects in progress and her family and professional colleagues have noticed positive changes. Sarah and her coach agree that their coaching relationship can be ended. They decide to touch base three months later to make sure things remain positive for Sarah.

Coaching for this type of situation is far more common in business than in the legal world. Many thousands of executives successfully use professional coaching each year. The figure for lawyers is far lower. Steve Axelrod, Ph. D., a psychologist and executive coach in New York City notes "when law firms consider whether to use coaching, one thing to keep in mind is that coaching is a widely used developmental tool in the corporate setting and that law firms are at least ten years behind in their use of coaching." Ron Reece, Ph. D., a psychologist, family business consultant and professional coach in Greenville, South Carolina, who works with law firms, believes "Lawyers have a higher degree of skepticism than the general population and for them to take the risk to have a psychologist as a coach is impressive."

As in choosing any professional, there are things to consider in selecting a professional coach. There is no required licensing or certification for professional coaches so make sure the coach has significant coaching experience. Professional development is essential. A highly competent coach should regularly be engaged in continuing professional education. Check whether a coach has had prior experi-

ence working with lawyers individually or with law firms. Knowledge of the legal profession and how it operates is valuable. Many coaches have backgrounds in psychology. That can be useful in analyzing behavioral patterns of the client and on rare occasions, determining whether therapy is needed instead of coaching. Finally, make sure the professional coach understands and recognizes potential conflict of interest situations. When coaching a firm, the interests of the firm may be different from the interests of individual attorneys.

Attorneys and law firms have as many reasons to use professional coaches as do businesses. A professional coach can assist firms to operate more effectively and attorneys to perform at higher levels with greater satisfaction.



Bonnie Montgomery has an extensive professional background in counseling and consultation. As a PhD in clinical psychology, she

has expertise in conflict management, behavioral change and the development of communication skills both with individuals and larger groups. Bonnie has combined these various disciplines to specialize in consultation to family businesses, individual professionals and other public and private organizations. Her practice, based in Columbia, SC was founded 24 years ago. She is currently also a partner in Coaching and Consulting Solutions, a firm specializing in professional and personal coaching and advising small and family businesses.

Bonnie earned her Ph.D. in Clinical Psychology from the University of South Carolina and her professional service experience includes terms as President of both the South Carolina Psychological Association and the South Carolina Academy of Professional Psychology. In 1997 Bonnie received the Award for Outstanding Contribution to Psychology and in 2004 was honored with Lifetime Achievement Award in Psychology. Bonnie is married, has one son, a daughter-in-law and a granddaughter. She enjoys exercise, spending time with her family, reading, hiking and travel. She can be reached at bonnie@coaching-consultingsolutions.com or at (803) 748-0309. Her web site is www.coaching-consultingsolutions.com.