

FROM THE JUNE *ABA Journal*

Coach Me

Three lawyers team up with three professional coaches to take their practices to the next level in just one month

By Jenny B. Davis

Professional coaching isn't a new topic to lawyers or even to the pages of the *ABA Journal*.

Yet we at the *Journal* continually hear lawyers say they are reluctant to turn that awareness into an actual working relationship.

Perhaps they don't understand what, exactly, a coach could do for them. Or they're not sure how to find the "right" coach—and even if they could, how could they spare the time?

That made us wonder what would happen if we helped the process along—if we custom-matched a lawyer with a coach and let them work together for one month at no cost to the lawyer beyond the expense of time and effort.

And so the *ABA Journal* Coaching Project was born. Last fall, we issued an invitation to interested lawyers via our electronic newsletter, the *ABA Journal eReport*. Although the invite appeared in only one issue, responses poured in from talented, successful lawyers across the country who are practicing in a variety of different areas and at every career stage, from new graduate to senior partner.

Despite the differences, these lawyers all had something in common: They wanted a boost—a shot of motivation, an outside opinion, a trained perspective—to help them achieve peak performance.

Working with our volunteer coaches, we analyzed more than 100 e-mails and were able to home in on three lawyers. We asked them to join the project and bare their professional souls—first to a coach and again to the *Journal*. Luckily, they embraced the task.

What follows is a summary of what they achieved in only four weeks (with some extensions due to scheduling conflicts). We hope their stories will illuminate the professional coaching experience and invigorate you to reach for your own brass ring.

The Lawyer: Frank V. Petrosino

Stats: For the past nine years, Petrosino has practiced with a 25-lawyer firm in Burlington, Vt., focusing on corporate matters such as commercial financing, mergers and acquisitions, intellectual property and tax.

Challenge: Petrosino wants to become the go-to lawyer for the Vermont hospitality industry. While he has been handling a variety of matters for different corporate clients, he wants to focus on clients in the local travel and tourism industry.



The Coach: David Freeman of [David Freeman Consulting Group](#) in Boulder, Colo.

Stats: Freeman, a lawyer, specializes in revenue-focused leadership and business development training for firms, practice groups and individual lawyers. With nearly 25 years of experience, he has worked with thousands of lawyers in more than 85 firms across the U.S., Canada



PHOTOGRAPH BY CAROLYN BATES

and Mexico.

Commitment: Freeman and Petrosino spoke five times. The first call, which lasted about an hour, was the longest. Petrosino also completed assignments in advance of each call.

Phone call No. 1: Before the first call, Freeman gave Petrosino a worksheet to complete to get a better sense of his business. The worksheet asked Petrosino to rate, on a scale of one (“hate it”) to 10 (“love it”) his level of comfort with a variety of marketing activities, including cross-selling, conducting new client pitches and cold-calling new prospective clients.

“Part of the art of coaching is making sure you work with a person’s strengths to help them achieve,” Freeman says. “I wanted to probe some areas to find out what his perception was.”

The area Petrosino ranked the lowest, giving it a one, was cold calling. Next to the number, he wrote: “I will not cold-call without first having presented new pro-spec-tive clients with some type of written marketing materials. Even then, I am not a big fan of cold calling.”

Using this as a starting point, Freeman gave Petrosino some ideas on how to warm up to those calls. Petrosino says he learned the importance of having a lead-in of some sort.

“Research is the key, and with that a common interest or contact helps the relationship.

You also need to be able to give something—to show the person what you can do for them. It doesn’t have to be a legal issue; it could be someone they are interested in meeting. Just something where you can say, ‘I can do that,’ ” he says.

In contrast, Petrosino gave speaking a 10, and Freeman suggested ways to play to this strength, such as

offering to make an in-house presentation like a “lunch-and-learn” to build the relationship.

“This lets people sample Frank—to see him as an attorney before they hire him,” Freeman says.

But Freeman warned that speaking isn’t a stand-alone strategy. “There’s a common fallacy that speaking itself will generate all the work, but if you ask lawyers if they get everything they want from speaking, they’ll say no,” he says. “There has to be an after-strategy to follow up and continue the relationship that was made.”

Phone call No. 2: Building relationships was a major theme throughout the sessions.

Freeman introduced Petrosino to his five habits of successful business development:

- Differentiating and defining yourself.
- Generating awareness.
- Getting live meetings.
- Building trust.
- Getting “the advance”—that second meeting.

“People who engage in the five habits form relationships, and then when something comes up for the client, they’re top-of-mind,” Freeman says.

They also broke down Petrosino’s target market—the Vermont hospitality industry—into smaller components, running numbers and writing it all down on a worksheet. “We looked at who the players are and what type of revenue generation can be drawn from their legal needs,” Petrosino says.

Then they added a billable goal, an origination goal and a client-mix goal.

Petrosino was thrilled with the results. “I had some ideas about how to establish this type of foundation, but David really helped me organize it and get to a place where I had more focus and clarity.”

Phone call No. 3: The topic of this call was positioning. They started with Petrosino’s goal of becoming the go-to lawyer within his practice area and then “drilled down to a level of detail” to establish concrete ways to achieve this goal, says Freeman. “We were in a process that allowed him to stop, sit back and think a bit—to say, OK, if I did this, who could I follow up with?”

They decided to ask Petrosino’s firm to create a hospitality law group and to make Petrosino in charge of it. The group would also include other lawyers at the firm with complementary practices. The purpose of creating the group was to establish credibility—to create a positioning tool and a credential that Petrosino could use throughout his marketing efforts, which include article bylines and client communications.

“It says to potential clients: If the firm trusts me, you can too,” Petrosino says.

After the call, Petrosino recruited colleagues and then approached the firm’s executive committee with his plan. He explained the purpose of the move and also what it could mean in terms of dollars and cents. The firm signed on.

Phone call No. 4: Petrosino invited his firm’s marketing director to sit in on this call, and the three discussed existing opportunities and what it would take to create new ones.

“That was pretty helpful to me—to be aligned with my colleagues at the firm and have them really on board,” Petrosino says. They discussed the marketing budget and also put together tentative plans for the firm to host an executive roundtable to bring prospective and existing clients together.

Phone call No. 5: In this final conversation, Freeman and Petrosino discussed the age-old issue of time. “This is the ubiquitous issue, but one of our creative solutions was to carve out an hour and a half on Friday and put it on his calendar as if he hired himself,” says Freeman. “That way he’ll focus on this time to do business de-velopment and move other issues to the sidelines.”

In the time following the first call, Petrosino had been able to set up multiple new engagements, including several lunch appoint-ments, speaking gigs and even a chance to sit in on a client’s man-agement meeting.

“Obviously I have a full plate at work that I need to get done, but David’s calls gave me motivation, encouragement and energy that maybe I wouldn’t have had if he wasn’t there cheering me on,” he says.

But Freeman also cracked the whip, Petrosino admits. “David would say, ‘What are you going to do?’ and then set specific time frames.”

Freeman credits Petrosino’s dedication for the incredible progress he was able to make. “You don’t always get this level of motivation, but he was there ready to go, ready to act,” Freeman says. “He really cares about doing these things.”