Ep #87: Change Management for Law Firms: How to Engage Your Team from Day One

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With Your Host

John E. Grant

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Too many law firm owners think that implementing new tools or processes or systems means figuring out what they want to do, then setting everything up as best as they can, and then rolling it out to the team once it's ready. But that top-down approach almost always backfires. It makes people feel like change is being forced on them instead of something that they're involved with and engaged with and that they can own.

As Peter Senge once said, "People don't resist change, they resist being changed." And my experience is that real lasting change happens when the whole team is involved and engaged from the start: setting the vision, naming the problems, shaping the solutions, and then supporting each other through the hard parts of the implementation. In today's episode, I'm going to share some ideas for how to make that happen in your law practice.

You're listening to the *Agile Attorney Podcast*, powered by Agile Attorney Consulting and Greenline Legal. I'm John Grant and it is my mission to help legal professionals of all kinds build practices that are profitable, sustainable, and scalable for themselves and the communities they serve. Ready to become a more Agile Attorney? Let's go.

Hey everyone, welcome back. So, this week, I want to talk about a question that I get fairly regularly, which is coming from people that maybe have been listening to the podcast for a while, maybe are looking to make any kind of a change in your law practice.

And the question is this: How do I roll it out to my team? And it's a good question, but it's not quite the right question, or at least the answer I give maybe doesn't quite answer the question, which is I don't think that rolling something out to your team is the best way to engage the team around the change that you're trying to make.

So, let me unpack that a little bit. Number one, I want to acknowledge that change is hard for people. I mean, it's hard in any situation, but it can be

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especially hard in smaller law firms, smaller teams, where maybe people are sort of playing a lot of roles already. They're doing the best they can to sort of manage multiple responsibilities.

And if you're going to say, "Yeah, you've got to change the way you work, the way you do something, the way you behave," that can be disruptive because they've kind of built this mental model around who they are at work, how they get things done, how they interact with you and the rest of your team, and any little change that happens is going to upset that mental model. And that's not easy to do.

Even more than that, there is research out there that says that people, a lot of their identities are wrapped up in what they do and who they are at work. And so, when you're asking people to change their behaviors at work, whether it's implementing new systems or following new policies or maybe adopting a piece of technology, in some ways, you're asking them to change their identity, right? They identify oftentimes with the work that they do. And so again, changing those things is difficult.

And there's a whole professional discipline that has grown up around this. The phrase that we use in the business world is change management. And back when I was working for a mid-sized consulting firm doing more general business consulting, I actually got a lot of formal training in change management.

And I think there are some principles from change management that can be useful, but one of the challenges I've had as I sort of try to use these techniques with my smaller firm, smaller team clients, is that a lot of the principles in change management come from big business.

And I actually would say they don't necessarily work as well as they could even in those big business environments, but the number of resources and time and teams and everything else that bigger businesses have at their disposal means that you can do some things from a consulting standpoint

and whatever else that you really can't pull off with a smaller business, and especially a business that is already probably running close to or over the red line like most small law practices are.

And my biggest problem, frankly, with those sort of old school consulting style change management efforts is they're built around a very top-down approach, which is to say the leadership of the business, of the firm, of the team, whatever, probably in conjunction with the "brilliant" consultants that are also being hired to do this change management. I use brilliant in air quotes.

They do a current state analysis, and they do a desired future state, and then the consultants do the gap analysis, and they try to figure out, "Okay, here are all the things that you should hire us the consultants to do in order to get your business from this current state to this desired state," and one of the things that you can hire us to do is manage the change management, the rollout of this initiative with your team.

But when you have senior leadership operating even with consultants in maybe something of a vacuum to envision that desired future state, you're missing so much information about what's actually going on on the ground floor of your business, right? The customer interactions, the day-to-day activities, the stuff that's really getting things done inside of that business.

And frankly, I saw this time and again in my consulting work, where people always felt like change was something that is being done to them as opposed to something that was being done with them, even though management usually tried to position it as something that was being done for them. But as you can imagine, most people see through that.

So, all of that is a long way of saying my answer to the question of - how do we roll this out to the team? - is, you don't. You involve the team from the jump, right? You get people's buy-in early and often, both in trying to come up with - hey, what's the challenge that we're facing? What are the problem

statements that we need to deal with? Also, what's the desired future state? Where do we see this business going? How do we see this firm performing by the middle of next year or the end of next year?

And doing that as a shared activity has so many advantages, right? Number one, as I hinted at a minute ago, it lets you bring in these multiple perspectives. It doesn't matter how good you are at trying to keep your ear to the ground on what's happening inside of your law practice, even if it's a very small practice, you're not going to pick up on everything.

And even if you did, your own biases, your own filters, your own way of looking at the world isn't necessarily going to pick up on some of the nuance that one of your team members or all of your team members are going to be able to perceive and express and help with as you're learning about what's going on inside of your business.

In my opinion, if you are not taking advantage of the knowledge and the intellect and the creativity and the perceptions of the people who are working with you on this business that, again, even if you're nominally the owner, they're part of it too, then you're really missing an opportunity, right? You're not using your team to its potential if you're not listening to what they're saying, how they're feeling, what they're experiencing on behalf of your clients as things go through your law practice.

Number two, people want to be part of a team. They want to feel like they're part of something that's bigger than themselves where multiple people are sort of working towards the same ends, the same goals, the same benefits to society. And so, it's very engaging and motivating to do the extra work it takes.

And I will admit, it takes a little bit more work and a little bit more time up front to do this work, to make sure that people are involved, but I think that doing it upfront is going to save you so much time and headache down the road when it comes to, number one, figuring out what we should even try to

do, and number two, rolling those things out and making sure that the members of the team are on board with what we're trying to accomplish with these new efforts.

And that segues into the third benefit, which is when people are involved in the discussion around the problem and then the creation of a potential solution, you don't have to roll it out to them. They're already invested in it, right? They've been part of the design, they've been part of the discussion.

And frankly, even if they don't fully agree with the direction that the team ultimately decides to take, if they feel like they've had a meaningful opportunity to be heard and to participate, most people are going to get on board and they're going to say, "All right, we'll try this."

And then maybe I get to say I told you so if it doesn't work out, and then we can try the thing that I wanted to do, or maybe eventually find out, you know what? We got to the result we were looking for and I'm happy even though my particular vehicle wasn't the one that we chose."

Now, one way I can help you do this, and I'm going to put in a little plug for myself wearing my consultant's hat, is I love to do workshops with small firms and legal teams in order to sort of shortcut this understanding of, number one, what do we do well inside of our firm to make sure that as we start to go engage in changes, that we don't throw out any babies with the bathwater.

But then really zero in on what are the challenges we're facing or where are the places where we collectively feel like we're falling short of where we'd like to be, and then come up with some concrete things that we can do to try to address that. Now, when I do this as a two-day workshop, I also embed it with a really healthy dose of training and we play some games, we have some group discussions.

It's really designed to do several things, right? Number one, make sure that everyone is on the same page as far as both what our vision is, what our pain points are, and what we might try in order to get from the current state to the better state. So yes, like a consultant would, except I'm doing it with the entire team. I'm leading them through that discussion, facilitating more than directing.

Number two, I'm training everybody on some of the concepts around process improvement and project management and using this lean and Agile approach that I've developed over the last twelve-plus years in order to make sure that everyone is sort of speaking the same language and everyone understands maybe some of the common root causes of the problems that they're having and also some of the maybe anti-patterns that arise with typical teams that might be leading to the challenges that they're experiencing.

Like I said, we play some games. One of the precepts out of Agile is we like to run safe-to-fail experiments. And so, games are a great way to sort of try out new ideas or try to embed new concepts in a totally safe-to-fail way, right? Like, yeah, we might want to win the game, but it doesn't ultimately matter if we do or we don't.

And in playing some of these games, it really helps sort of bring the concepts from process improvement, project management to life in a way that people have not just listened to me about it, but they've actually experienced it themselves, if only in the context of the game. But that can be really powerful because once you've experienced it in one context, it's a lot easier to translate that into a different context, which is your actual working life.

And then, like I said, the second part of the second day of this two-day workshop that I do is really focused on making sure that everyone agrees on which of the concepts we learned about and discussed are we going to

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try to implement first, what are the specific ways that we're going to try to use them inside of our practice, coming up with some group agreements, some team agreements. Number one, so that we all have that shared direction. Number two, so that we can provide a little bit of accountability to each other.

Because one of the other things, and I'm going to sort of transition out of, I guess, pitching my workshop and into continuing this discussion around change management, is that even when you do everything right with a team in terms of involving them and engaging them and having this shared sense of where we're going, once you actually start trying to change something, even if the team is trying to change themselves, it's always harder than you think it's going to be.

And so, one reason to do it as this group exercise is that when different people are getting cold feet, usually not everyone is getting the same low at the same time. And so, you can all support each other through the various tough points, the sticking points, the friction points when you're trying to make this change.

And it really does take somewhere between like 30 and even 90 days for these changes to stick. Usually not quite 90, that's on the long end, but I really do think it takes several weeks of sustained effort. And for a while, sometimes things are not going to feel as good as they did before you tried this change. And there's going to be a tendency to want to retreat back to the safer ground of the old way of working, of the status quo.

And I totally get that instinct, but I have seen it time and time again where if you retreat back to the status quo, you're just going to keep on experiencing the same old problems, the same old challenges, right?

And so, this group effort and basically implementing these changes in an intentional way, it helps you push through what sometimes is referred to as the trough of despair, which is, you know, that little dip of productivity, of

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energy, of kind of just psychology when you're working with something that is new and strange and maybe a little confusing before you start to get the hang of it.

And then it's kind of this J curve where, yeah, there's a little bit of a dip, but once you get on the other side of the dip, then things start to get so, so much better. And you really do feel empowered around the change that you've made. And frankly, also more excited oftentimes to make the next change, right? So, dealing with that discomfort is a learned skill.

There's even the notion, and you can go Google this idea of failure training, where people intentionally put themselves in positions where they're not going to be able to succeed at doing what they want to do because getting used to failure is something that helps you push through those dips and gets you over to the other side.

I'm not saying we need to go to any extreme lengths to do that kind of thing, but it's very real, right? That trough or that change, that uncertainty, we've got to push through it to get to the other side and making sure that we're doing this change as a group activity is, I think, the best way to do that together.

If you want to get some ideas about how to do some of that engagement yourself, I'm a big fan of a tool called the Agile retrospective. I talked about retrospectives back in episode 54 of this podcast, which was one of my discussions with Tim Lennon, and then I also talked about it in episode 29, which also discussed this idea of getting team buying for change, but I talked a little bit more specifically about the retrospective process.

I'm going to leave it at that for today. As always, if you want to talk with me about how to do some of this visioning, how to maybe conduct a retrospective, or even just to sort of talk through one on one with the challenges you're facing in your law practice, you can either shoot me an

email at john.grant@agileattorney.com or go to my website and look for the link to book a discovery call.

If you're a little further down the Agile journey and you're pretty sure that you want to implement a Kanban system of some sort, you can also go to my other business, Greenline.legal, and click the Book A Demo button. One thing I will say about those demos and the onboarding for Greenline is that we are similarly insistent that we involve the entire team with the onboarding process.

And even though maybe you're the one, the owner is the one who is making the decision to try this software project or try this software solution, we really want to make sure that we get your entire team on board and that they feel like they are part of the design, that they are part of the implementation, that they're engaged and aware and involved with what is happening as we configure this thing so that it's a tool that works for them.

And again, I think helping people solve their own problems in addition to solving the problems of the firm is one of the best ways to get engagement overall.

And with that, as always, this podcast gets production support from the fantastic team at Digital Freedom Productions, and our theme music is "Hello" by Lunara. Thanks for listening and I will catch you again next week.