



KLR Consulting

Inspiring Success in Your Leaders and Teams

Montgomery & Hansen, LLP | Success Story

"Kristi identified and removed the obstacles that we couldn't see that had stalled our strategic planning process. That helped us to focus on the real work."

Law firm Montgomery & Hansen specializes in supporting entrepreneurs and investors as they start and grow successful companies. The firm itself is growing, and the partners knew they needed a five-year strategic plan to guide their growth, but there were some shifts in the firm that needed to be addressed.

John Montgomery, a founding partner, has been envisioning the "new economy" for years. He was instrumental in getting benefit corporations legalized in California, is at the forefront of the Conscious Capitalism movement, and is the author of the book "Great From The Start".

He had reached a point where he needed his partners to better understand and support his work in this arena. At the same time, he hoped the other partners would take an active role in determining the future of the firm.

He says, "I'd been driving the strategy up until that point, and I wanted them to get more involved, and have the experience of defining our course and leading the growth of the firm. But it never went anywhere. Finally, we realized that we needed to bring in a facilitator."

John knew of quite a few consultants that could help, but ultimately, he says, "We chose Kristi because she had substantial experience with lawyers, and she really understands how we tick. She's a plain speaker, no jargon, so even the most rational thinkers understand her. She was the perfect person for us."

Communication First, Then Planning

Initially, Montgomery & Hansen brought Kristi in to facilitate the strategic planning process. However, it quickly became apparent to her that there were issues that needed to be dealt with before that process would be able to move forward.

John was frustrated trying to get his partners to understand his current work with benefit corporations and Conscious Capitalism. The other partners were frustrated because they didn't know what role John wanted to play in the firm, or what he expected from them.

In between strategic planning meetings, Kristi and John worked on John's awareness of his partners, and his communication style with them. Kristi helped him to understand that his partners were shutting down because they felt that he was asking them to change.

Montgomery & Hansen, LLP

Industry: Legal

Challenges:

- Lack of cohesive future vision & direction
- Strategic planning process stalled
- Communication with partners
- Leadership focus

KLR Solutions:

- Facilitate strategic planning process
- Executive coaching
- Leadership development
- Communication skills development

Benefits of KLR Programs:

- Improved communication with partners
- Increased buy-in from partners
- Strategic planning process now moving forward
- Vision articulated & accepted by partners

"Lawyers are upholders of the status quo. We swear an oath to uphold the laws, and we are not generally change agents."

For the partners, it seemed like John was asking too much, while at the same time it wasn't clear to them what he really wanted.

Executive Coaching

Kristi helped John to see that he needed to change the way he was communicating with his partners.

"My law partners were my best teachers, once Kristi got to the core of the problem - I simply wasn't connecting to them, and this forced me to actually face my inadequacies in my communication style."

Kristi spent several sessions with John working to help him pare down his message, distilling it to just the essentials that he needed his partners to understand. John says, "Kristi helped me to articulate my message with absolute precision."

Strategic Planning For The Firm & The Partners

During the initial strategic planning session, Kristi was able to demonstrate to all the partners that much of what John was talking about was already present in the firm's values.

John was able to show the partners that, "The firm is positioned as a bridge between the old and new economies, because we have quietly designed our law firm to embody the principles of this new paradigm. We are a core values-based business - we've baked our values into our operating agreement, as our code of conduct. They are already experts in the new paradigm because we've been living it."

Once this became clear, and the partners stopped feeling like they were being preached to and asked to change, they relaxed and became more receptive. They were able to move forward, defining their individual strategic goals as members of the team, as well as contributing to the strategic plan for the firm as a whole.

Clarity, Enthusiasm & Buy-In

John says that the partners now seem to understand that his ideas are gaining credibility, and that the firm can really use their legal architecture and innovation to move into the new economy, and the future, with relative ease. The other partners are now more comfortable with John's role, inside and outside the firm.

With improved communication from the top, the atmosphere in the firm has changed, and there is a new enthusiasm for the strategic planning process, for defining partner roles more clearly, and increased buy-in for the work going forward.

John says, "It's a huge start. With the communication issues brought to light, we can do the real work. We are still refining the strategic plan, but with Kristi's help we are almost there!"

"We chose Kristi because she had substantial experience with lawyers, and she really understands how we tick...She was the perfect person for us."

~John Montgomery, Attorney & Founding Partner

To find out more about KLR Consulting, visit our website www.klrconsulting.com