JANE SOUTHREN
CONSULTING

Engage · Inspire · Empower

Path to Equity

Aggregated Insights + Actions

Module 3: Building Loyal Relationships

McMillan LLP
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This program contains one *Professionalism Hour.*

LAW SOCIETY OF ONTARIO accredited

Welcome to Insights + Actions Summary

As you are now becoming accustomed to, part of our Distributed Learning Process, **Week 4 i**n every module will be an **Aggregated Insights** + **Actions Summary** that captures what you've shared with us and with one another throughout the Module. These summaries are aimed at ***application, acknowledgement* and *accountability***

This is your **third** Insights Summary. On the following pages you'll find all of the insights and actions shared by you and your cohort colleagues.

As a reminder: you do not need to feel constrained to sharing insights and actions relating only to the current Module. The concepts and ideas we work with benefit from time and reflection, and we often find that topics raised at an earlier stage of the program are the subject of actions and insights later in the program. That is something we welcome because it shows that the ideas are taking root in your minds and you are reflecting and acting upon them in a longer term context.

As with the **Learning Guide** you received in Week 2, we encourage you to read this Summary over a couple of times and save it for future reference as you continue through the Program. Often, insights continue to deepen as time goes on, and it might prove useful to you to reflect back on these and others in the coming months.

We hope you find this summary, well, insightful! And we hope it helps you to stay connected to, and take action around, the material we presented in **Module 3 :: Building Loyal Relationships.**

Loyalty :: Insights

As always, we asked you to share your ***Insights*** in connection with **Module 3 :: Building Loyal Relationships.** The prompt we used was this:

Share One Insight: Tell us about one 'sticky' or significant thought or idea that you had arising out of any aspect of this Module. Whether from the **Learning Session (Week 1), the Learning Guide (Week 2), or Coach's Corner (Week 3).**

Here's what you shared:

Clients respond well to lawyers who don't only engage in respect of their own areas of practice and expertise, but who have an interest in the client's business more broadly. And those conversations are also good for the lawyer because the more you know about the client's business, the better and more complete your advice and service are. Knowing more about the business of the client could also help the lawyer support the client to advance their own personal career success which is mutually beneficial.
Awareness and recognition of some of the things that are already being done that are good relationship building activities: • some informal communication (Belonging), • google alerts and other feeds of relevant information about clients (builds trust, recognition, status, relatedness), • delivering specifically relevant education (trust: competence/capacity, belonging: recognition); whether one on one, to a team or in a community - the latter of which has the added benefit of giving the clients the opportunity to meet and get to know each other (social capital: connections)
Loyalty is about personal relationships and shared understanding as much as it is about business competence.
Importance of differentiating between enterprise to enterprise loyalty (ie, Client Corporation to McMillan LLP), and individual loyalty where we can grow relationships.
Companies cannot be loyal - but individuals inside of companies can be. Focus on building the relationships with the individuals.
When building a relationship with a client, think about the whole person. Who they are, what they enjoy, what matters to them. In one case a client became so important to the lawyer that she visited him when he was terminally ill and was a source of comfort to his friends and family. That client continued to be responsible for work coming even after he passed, because of the relationship.

Loyalty :: Actions

Finally, we asked you to share any ***Actions*** you took, or felt inspired or intend to take in connection with the **Module 3 :: Building Loyal Relationships** materials**.** The prompt we used was this:

Share One Action: Tell us about any action that you were inspired or committed to taking in connection with what you learned about ***how to move relationships along the loyalty continuum*** that we explored in Module 3.

Here's what you shared:

Be more engaged in conversations with the clients that reflect and broader interest in their business
Create google alerts on clients, and review press releases etc., to harvest information about the client that could be used to ground additional conversations, show a heightened level of interest in the success and well-being of both the enterprise client and the individual representatives of the client and provide opportunities to show insight as a result of learning of information relevant to the client before being told about it by the client.
Create more points of contact inside each client where possible
Try to put challenge into action by furthering loyalty relationship with identified client representative
Inspired by comments from my colleagues in our chat - I will be catching up with a client who has paused his work to better manage costs during the pandemic and will try and figure out if we can find a way to assist him with some upcoming patent filings that need to be done (for legal reasons) while delaying collection of our fees, or structuring them to accommodate his current financial circumstances.
Because litigation is so transactional, look for other ways to add value to clients by providing information on topics of interest or relevant legal decisions, and keeping conversations open beyond the transaction of the litigation itself.
Continue to build relationship with in-house counsel of US client based on shared personal connection so that when more work comes, we are top of mind.

Loyalty :: Stories

Some of you shared your stories that set up your insights and actions. Here's what you encountered, the insights you experienced as a result, and the actions you have taken/intend to take. As you all read through them, we'd like you to note the similarities between the stories in terms of the context (eg new team members introduced on the client side) and the different parts of the loyalty continuum from which the lawyers sharing the stories found useful insight.

Story: There was an existing deep loyalty with one member of the in house team with one of our clients. A new person joined that team and the McMillan lawyers serving that client had not found opportunities to build their relationships with the new person because the normal means by which they would have done so are not as readily available during COVID. A situation arose for the client, and that new client team member began articulating some dissatisfaction, which had never been the case with the better-known member. The new person started making statements that may have been veiled inferences that there was a risk that the client might move their work. The McMillan lawyers did find ways to resolve the dissatisfaction expressed, with some creative thinking, but it was an interesting experience to see the difference in behaviour between a client representatives with whom we have a loyal relationship and one with whom we do not.

Insights:

- It is really important to be conscious and diligent about the nature of relationships with client representatives, especially new ones, because when new people join the team, the dynamic can change.
- It is a good idea to be conscious and intentional about creating multiple points of loyalty within any particular client enterprise - each firm member should have multiple connections with representatives inside any client and build each of those relationships to the highest levels of loyalty possible.

Action: Set up a virtual event with the specific purpose of making that new client team member feel a sense of belonging, that will be directed at an experience that reflects something that he likes/is interested in.

Loyalty :: Stories

Story: A new team member joined an institutional client and didn't have a relationship already established with McMillan. Communications with this client were often negative, critical and actively hostile to the point where it appeared that the relationship was being intentionally sabotaged. It was clear from the communications that it was more than a matter of getting to know each other, there were some basic trust elements that needed to be shored up and cemented.

In addition to taking the time to craft detailed responses to the critical emails, outlining exactly what was being done and why (working on the foundational trust in competency, capacity, and character), attempts were made to schedule video calls with all team members so that the client could see the McMillan lawyers as real people. The interaction in these "face-to-face" meetings was markedly more positive, and the overall relationship appears to be improving.

Insights:

- You need to have the foundation of trust before you can build the relationship.
- Seeing the humanity in the other person (both on the client and the lawyer side) is the first bridge to building into belonging.

Story: After doing some work for a client with whom there is a good relationship in a practice area that isn't the primary/desired practice area, the McMillan lawyer has been introduced to two other members of the client organization who do work in the primary/desired practice area. However, there is a strong relationship between those clients and another firm. The McMillan lawyer has been called for a second opinion and has had positive interactions, but is looking to build the relationship to the point where he is the first call for the primary opinion/matter.

Insights:

- It can take time to build relationships, and there are many ways to show interest/get to know a client in addition to work-related topics.

Loyalty :: Extended Insights

In some instances, as insights were shared, conversation extended or transformed them, and new ideas emerged. Here is how some of the initial insights evolved.

How can you build deeper relationships when COVID is preventing us from using some of the tools we would normally use? **Informal communication.**

- It is really easy, can be done inside or outside the context of work and doesn't take much time. Sprinkling communication that is informal in tone or content throughout your communication with another person consistently is one of the most efficient and effective ways to build relationships to the highest levels of loyalty they are capable of reaching.
- It is the only form of communication that builds relationships at the highest levels of loyalty because it creates a sense of belonging. Formal communication at best maintains the status quo in relationships, but more often corrodes them, because it feels cold and transactional.

How can you initiate a deeper relationship with a client if one or both of you is inactive on social media? **Look for the clues**.

- Have they mentioned an interest or other business in their conversation with you? Can you learn more and follow up?
- Is there something on their corporate bio page that could spark a conversation or something for you to investigate further?

Completing the Module on Loyalty

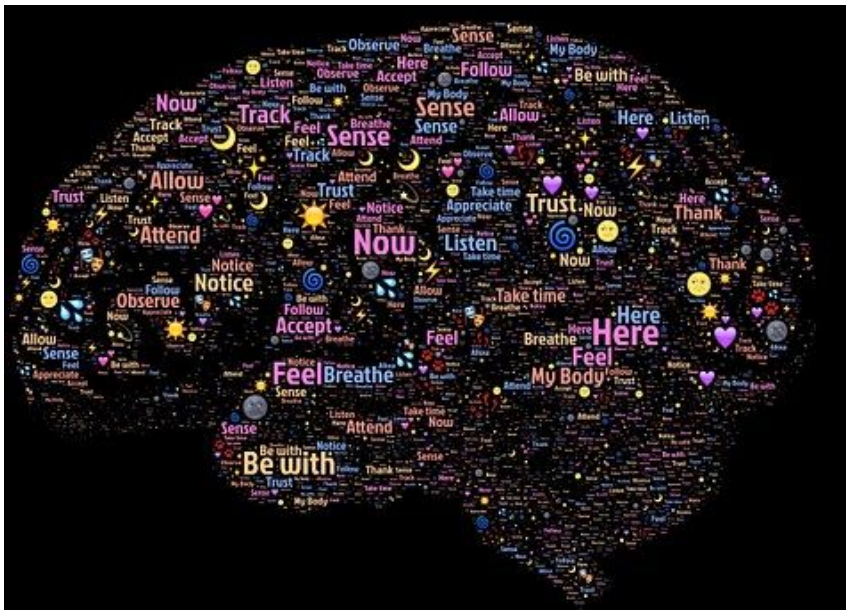
Congratulations on successfully completing **Module 3**! This is the third of ten modules that you'll be participating in throughout the Path to Equity Program, and we hope you enjoyed the experience.

As always, we welcome your thoughts and feedback on how we might have improved this Module, or how we can make improvements on future Modules in the program.

If you'd like to email us with any thoughts, feedback, praise or suggestions, please do so by reaching out to jane@southren.ca

See you in **Module 4 :: Enhancing Influence**.

Get Connected! While you were sharing your Insights within Coach's Corner, we prompted you to connect on social media (particularly LinkedIn and Twitter) with all of us on the JSC Team and with your cohort colleagues, and to actively engage on these channels to build your relationships with us and each other. If you haven't had the chance to do this, please do!



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