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Legal Collaboration: Expectation vs. Reality

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Peruse any standard law school syllabus, and you'll find a class – and a curriculum at large – that rewards individualism. An attorney's entire career rides on their sole expertise to attract clients. With this in mind, from test scores to days in court, it's no secret attorneys often prefer to practice separately. It's easier, not to mention they don't have to rely on someone else – and thoughts of “What if they steal my client?” can be put to bed.

But it's lonely and risky at the top. We're seeing the narrative is starting to change with the advent of successful collaboration and the value it's bringing to law firms. (Who knew working together could pay off so well?)

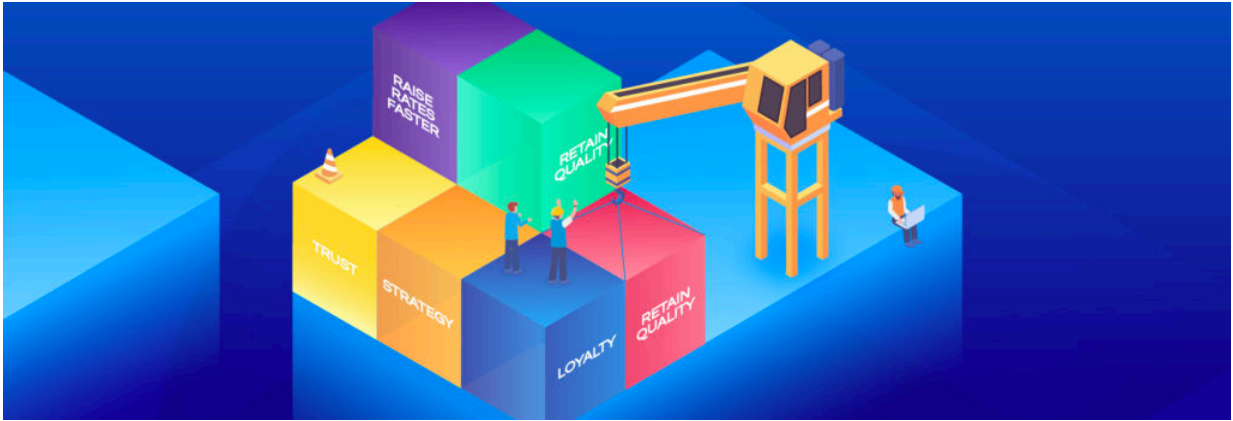
Legal collaboration “*involves specialists working together substantively to deliver a project rather than experts working separately in disciplinary silos.*” (Source)

Distinguished Harvard Law School Fellow Heidi K. Gardner uncovers the empirical, often unlocked potential of collaboration: that “clients served by multiple practices are far more likely to retain their law firms for longer – even when the client-relationship partner leaves.” The higher margins brought on by attorneys working together are often ignored due to the inherent risks and lack of competency trust. After all, as we mentioned before, attorneys are led to their profession on the efficacy of their own work; their own test scores; their own intellect. It's far easier to trust yourself than another associate in an area of law you're not well-versed. And what if they take your client?

On a surface level, matter collaboration may not seem palatable to risk-averse firms, but the long-term payoff reaps considerable rewards for attorneys by helping them gain a wider breadth of experience and higher payment margins – often by hundreds per hour in a few short years.

So let's demystify the stigmas around collaboration and discuss how you can take actionable steps toward adoption of its practices in your firm:

Legal Collaboration: More Effort Than It's Worth? Think Again.



Although expectations around collaboration may feel limiting, the reality is, for many firms with a “lone wolf” mentality, it’s likely roadblocks will occur. This, unfortunately, leads to confirmation bias of its ineffectiveness. Many firms rife with high stakes projects feel the effects of performance pressure, leading to risk-aversion and often less-than-stellar outcomes.

However, with the proper checks and balances in place (which we’ll cover in more detail later), **matter collaboration opens up a treasure trove for lawyers to work across specialties, gain loyal clients, and charge more for their work in the long run.**

Why?

Clients are privy to value; they want **strategic direction** and validation more than anything else. And yes, while a bevy of attorneys possess technical prowess, no one knows all the ins and outs of every aspect of law. Being able to drive the car forward in a way that benefits your client’s best interests leads to higher margins and a better relationship with your partners. The fuel to keep the car going lies in ongoing colleague collaboration.

Not only that, but cross-practice collaboration encourages a team player environment and reinforces loyalty to the firm and all its partners. Consequently, this helps train lateral hires and retain quality associates for longer, too.

Here are some insights from years of research (sourced from Gardner’s report):

- Surveys and interviews with hundreds of practicing lawyers reveal that **trust in colleagues** is the key ingredient that enables knowledge sharing and collaboration
- According to data from one large law firm, a single work referral typically generated about **\$50,000 of extra revenue** for the receiving partner
- Cross-practice collaboration experience allows attorneys to raise rates faster than peers only doing siloed work, raising from \$500 to well over \$750 (with attorneys in siloed work only raising to about \$600 in comparison)

These collaboration referrals also provide an extra layer of security during recessions, as 2008’s market crash proved. With even five to ten trusted associates, you can ensure during hard times that you’ll still have work coming through to you.

Ways to Facilitate Collaboration

In order for collaboration to truly thrive, a clear plan must be in place. When it comes to legal

collaboration, creating goals, and specifying how they're measured is vital for attorneys to understand expectations.

Psychosocial Rewards

In Gardner's report, she discusses the need for psychosocial rewards to help further relations and fill in the gap for trust: "Therefore, provide abundant psychosocial rewards, such as recognition for excellent client work or firm-building initiatives. Compensation still matters, but people pay far less attention to it than in places where 'the number' is their only signal of their worth."

Rewarding performance with compensation bonuses alone isn't a failsafe to fostering an environment for accessible collaboration. This is especially telling in firms seeking to bring up junior associates and help build their repertoire. If an attorney gives one of his cases over and doesn't meet a specific quota, it would hardly make sense to give the extra bacon to another who kept everything to himself and refused to mentor or funnel cases to other juniors. This is counterproductive toward spreading knowledge, and instead manifests as a roadblock rather than a benefit.

Face-to-face Interaction

Another way to encourage collaboration is to host face-to-face events. This networking will forge stronger relationships and increase knowledge on all colleagues and their capabilities. It's been shown that firms that do happy hours and retreats – ways for associates to get to know each other – strengthen the firm and keep employees engaged and loyal.

With these methods in motion, now all you need are the tools to keep the momentum going – what can be seen as the wheels of your collaboration car.

Software and Collaboration: The Facts

It's important to note before moving forward that regardless of any software, **matter collaboration succeeds only by fostering an ongoing environment of trust** – both in relational and competency trust – between associates. Trust is the key ingredient that creates your coveted high profit and strategic direction benefits as time progresses.

With matter collaboration, you need effective communication tools to enable visibility for everyone. At the end of the day, a law firm is nothing without its people. You need a channel to share ideas; pitches; networking events. And you need a space that makes sense of it all with custom dashboards and reporting. Welcome to Centerbase's [project management](#) and [client relations tools](#).

Here's how these tools can help:

Client Service Tools

Creating an easily digestible experience for clients is built directly into Centerbase. [Our text messaging app](#) allows for frictionless, real-time communication between you and your clients – all stored directly in our cloud-based system from any device. Simply send a message, and skip playing phone tag. Rest assured, for confidential information, you have the capability to send an

encrypted email straight from the app.

But what does this mean for referrals, you may be asking? It means you can transfer all the same conveniences – for instance, with billing and communication – to other associates and referral cases. It's one platform for everyone to use.

- **24/7 tools:** With convenient 24/7 tools readily accessible, everyone can remain aligned on billable hours and the status of all cases a client is involved with
- **Matter specific phone numbers:** Maintain boundaries between work and home by using the software's generated numbers (no more giving out your personal cell phone number)
- **Conversation tracking:** Conversations can be directly tied to matter, so you never have to remember who said what when – it's all in the digital file, so you can read and go "Oh yeah, I remember!"

Project Management Tools

The staff at your firm are the very backbone of daily operations. Empower them with seamless tools to be more efficient, make less mistakes, and flourish in personal development.

The very same occurs when it comes to collaboration. Once the doubts of investment and associate trustworthiness are removed, you'll have full visibility into all associates and what's being worked on. This isn't about reinventing the wheel; it's about simplifying the cogs and removing impediments.

- **Matter reporting:** Get instant caseload updates and important stats, such as upcoming deadlines or various case updates from associates
- **Deadline management:** You can easily juggle different areas of law for one client – our deadline tool imports all region-based court deadlines directly in the system
- **Visual tracking:** Use kanban style tracking with a simple drag and drop interface (think Trello, but for legal management and matter collaboration)

The Reality of Legal Collaboration

As they say, two minds are better than one. While there are risks involved in adopting collaboration in your firm, if onboarded properly with outlined incentives (not just compensation), the benefits are vast.

The law firm landscape is changing, and adapting with effective collaboration methods will keep your talent engaged while also broadening their skills.

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