

The legal industry is at a crossroads

Is your law firm headed in the right direction?

We can help.

LEADERSHIP
BALANCE®



Mind. Will. Heart.

Legal industry faces an accumulation of old and new challenges

The legal industry is continuously changing: Are you solutions-focused?

The legal industry is in a state of continuous evolution. In fact, law firms all over the globe, are facing an influx of challenges, including; succession planning, outsourcing, globalization, client retention, talent acquisition, and generational differences. With each of these challenges shaping the workplace in complex and often unforeseen ways, firms are looking for a partner to help them mitigate current obstacles, better equipping each firm for the future.



Legal firms all over the globe are looking for solutions to large-scale challenges. Are you facing any of the following?

- **Changing client needs and use of legal services:** With clients looking for more services, for less money, is your firm equipped to handle the market's demands?
- **Industry consolidation and new types of niche competition:** Do you have the right talent in the right places to elevate your practice above the rest?
- **New ways of branding for and communicating with client prospects, clients, and firm members:** Are your professionals well-rounded in communication strategies and leadership capabilities?
- **Generational and succession issues:** Never before have five generations aligned before in our workplaces. The stakes are higher than ever before, are you ready?



Challenges create need for new “ways-of-being” for firm leadership and staff alike



Setting the stage for the next decade: What's in store for the legal community?

According to the Major, Lindsey & Africa 2018 Outlook Report, “As the legal industry sets an even sharper focus on profitability, law firms and corporations are turning to analytics to evaluate productivity and growth, spot emerging business trends and build new pricing models. In the midst of this political and economic ambiguity, law firms and legal departments alike will continue to be under increasing pressure to drive down costs and increase productivity.”

We've seen five, main obstacles in the legal industry, in offices all over the globe. Each one of these challenges can be overcome with the right tools and methodologies:

- Leading (or teaming within) larger, far-flung, more diverse organizations
- Cultivating deeper client relationships
- Attracting, retaining, developing Millennials
- Managing stress and burnout
- Succession planning

Helping leaders meet these needs (for selves and teams) is Leadership Balance's specialty



Leadership Balance is uniquely-positioned to elevate your firm and its offerings

"The Leadership Balance Team accelerated participants' readiness for optimal job performance and success, resulting in a more satisfied and productive partnership, contributed to our positivity, healthy work culture, and become more experienced business advisors to our clients – all of which leads to firm growth."

- Andrew Giacomini, Managing Partner, Hanson Bridgett

Leadership Balance integrates the three key dimensions of great leadership – mind, body, and heart...

Leadership Balance combines contemporary leadership principles with proven strategies for four, leader-centric areas including, mental competency, physical endurance, health and an encouraging spirit to bring out the best in your legal professionals. As the foundation of a powerful process, our approach develops a new generation of effective leaders—from inside the organization.

Today's organizations are under immense pressure. Equip your professionals and leaders with a holistic approach for maximum success and growth...



Mind to Lead: Strong leaders develop strong teams that create strong companies. We look at all aspects of mental readiness that are inherent in great leaders: decision making, problem-solving, vision, innovation, communication and a winning attitude. Our process ensures that your current and future leaders have the proper balance in all these areas.

Will to Lead: Today's leaders need to have the stamina to master multiple challenges. Fit leaders embody the attributes of discipline, mental and physical toughness, an active lifestyle and confidence that breeds self-assurance in others. Our programs identify and enhance the attributes needed for a strong physical capacity to lead.

Heart to Lead: Great leaders exhibit great character, great attitude, and a great moral compass. Authenticity, integrity, compassion, and an optimistic, encouraging personality are foundational for building trust – which in turn builds high performing teams.

Mark Weber, Dean of Career Services at Harvard Law School, believes,

"Lawyers, like society as a whole, are starting to have more conversations about mental health, life balance and inclusion. With employers focused on creating a healthier and more inclusive environment for all employees, this is perhaps the most meaningful change for new attorneys and for the profession."



Our Team



Cathy Light, MS HROD
Chief Executive Officer



Nancy J. Geenen, M.A. Ed., JD
Chief Strategist, Legal



Marc Giudici, PhD
Employee Assistance
& Wellness, SME



Jennifer Chappell
Business and Program Manager

Your globally recognized LB team, brings high impact delivery to your leadership and organizational learning.

“We offer the foundation of a powerful process for developing a new generation of effective leaders, raising efficiency, productivity, and hourly billing—all at once.”

– Cathy Light, CEO
Leadership Balance

Our proven five-step process

- We begin each client engagement by building an open and trusting relationship- the very core of how we work!
- Ensuring alignment by working wide and deep strategically across the enterprise, we are an extension of leadership, rolling up our sleeves and integrating into the business.
- We're highly focused, on interrelated health and wellness goals.
- We report findings early and often to you with our unique data capabilities.

Powerful insights from big data

While everyone talks about “big data,” we know the difference between insight and action is tying data to strategic planning. Our Acceleration Analytics approach incorporates targeted data collection of key performance measures allowing us to identify and quantify the impact of our program—creating ROI for your business and team instantly.

“At Hanson Bridgett, we have been working with Leadership Balance® for two years now, and have found their vision, insight, and industry understanding of what leadership should be in law firms to be unmatched.”

- Andrew G. Giacomini,
Managing Partner,
Hanson Bridgett



Stay relevant with a 5-step approach that has your success in mind...

Our leadership and coaching programs for law firms, includes fresh content with guided road maps for growth, firm alignment and workplace well-being. From assessments and planning to training, workshops and one-on-one-style coaching, our proven strategies are customized for your unique environment- personalized to match exactly what you need most.



1. Discovery & Key Challenges

- Integrated silo practices or growth through collaboration and cross-selling
- Identify and retain high potential associates
- Strengthen skills of attorneys in leadership roles
- Optimize organizational structure for delivery of superior client services
- Groom potential leaders for smooth succession and transition



2. Planning

- Establish clear standard core values and long term business goals
- Map organization structure for peak performance
- Department and practice planning for growth and client retention
- Strategic planning support



3. Talent Development

- Partner leadership and development coaching
- Associate development
- Key client transition planning
- Strategic hiring process



4. Long-Term Leadership

- Talent assessment and development
- Department group team building
- Succession planning



5. Pulling It All Together

- Clear Mission/Vision/Values are aligned with organizational structure, decision making and people engagement
- Firm organizational structure supports long-term business goals and enables firm to be agile, competitive and relevant
- Partners are valued for their cultural, leadership and financial contribution to firm
- Associates have a clear career path that values their personal and financial contributions
- Leadership pipeline is clear; future leaders are enrolled in formal development program
- Formal succession plan is established to create sustainable business model

Our offerings for law firms



On-site Facilitation



Online Development



Coaching (1:1 and Teams)



Sample Partner Program

On-site Facilitation

Our unique process brings support, flexibility, and personalization to program delivery

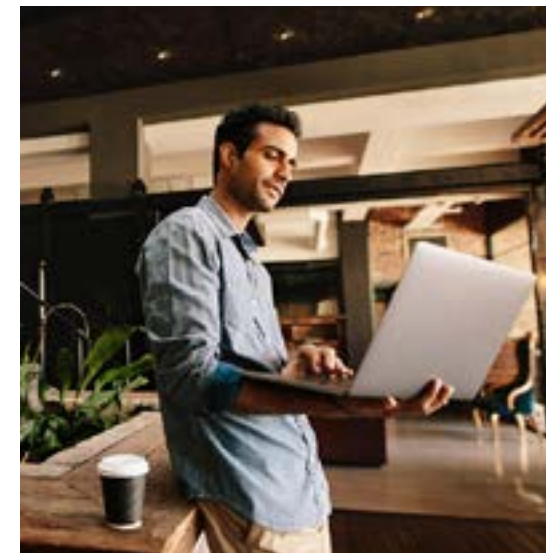
Customized on-site content and support for live facilitated sessions, guided management meetings, for on-the-job performance support. On-site facilitation also provides invaluable insight to learning how you and your team can make a difference in diversity, equity, and inclusion. Facilitated in person, on a monthly or quarterly basis.

POPULAR TOPICS

1. **Deconstructing Leadership Myths:**
Empathy-based leadership and the financial motivations behind wildly successful companies.
2. **Smart Strategies:**
Solid decision-making for the boardroom and beyond.
3. **Bringing it Back to The Team:**
Putting culture first.
4. **Diversity, Equity and Inclusion:**
What does this mean to our firm?
5. **Strengths Building:**
Recognizing an individual for who they are and what they bring to the table.
6. **The Ever-Changing Pyramid:**
Leading by example in the office and on the street.
7. **Uncovering Unconscious Bias in The Workplace:**
Men are often unaware of how they have been socialized with a bias, particularly (but not exclusively) against women. It shows up in hiring, promoting, conversations, and decision-making.
8. **Making Work a Safe Place: R.E.S.P.E.C.T. :**
Leaders must model and demand respect for all people in the workplace, period.
9. **Beyond Quotas:**
Finding and developing diverse talent that is the best for the job.
10. **#MeToo**
Educate yourself and others to become role models and champions against sexual harassment and discrimination in the workplace.
11. **Playing to Your Strengths:**
Research shows that male and female leaders perform differing leadership tasks more effectively. By including women in your leadership, you can ensure well-rounded leadership performance for your organization.

KEY LEARNING TOPICS

- The Emotionally Intelligent Leader
- Listening
- Diplomacy and Tact in Challenging Situations
- Building and leading teams
- Managing Diversity
- Gender and Leadership



POPULAR TOPICS FACILITATED BY SUBJECT MATTER EXPERTS

- Trust and Team Building
- Strategic Drive
- 360 Alignment Factor
- Communicating What Matters
- Executive Brand
- Getting Connected
- Power of Fitness
- Self Monitoring and Leading With Social Intelligence
- An Innovative Mindset
- Multi-Generational Workforce



BUILDING YOUR PRACTICE

- Competitive Marketing Strategies: Analyzing Your Organization
- Reaching Customers Digitally
- Helping Customers Find You
- Managing Your Corporate Reputation Online
- Focusing on the Bottom Line as an Employee
- Managing with a Cost-control Mindset
- Key Elements of Business Execution
- Aligning Unit Goals and Imperatives
- Building Your Professional Network
- Prospecting: Panning for Sales Gold
- The Discovery Meeting: Starting Off on the Right Foot
- The Value Proposition: Getting Your Pitch Right
- Negotiating Well and Going for the Close
- Thinking Strategically as a Manager
- Using Strategic Thinking to Consider the Big Picture
- Identifying Risks in Your Organization
- Assessing Your Organization's Risks
- Responding Effectively to Risks

LEADING YOUR PRACTICE GROUP

- Managing Your Company's Talent
- Fostering Mentoring Relationships
- Maintaining a Cohesive Multigenerational Workforce
- Managing Multigenerational Employees
- Managing Motivation during Organizational Change
- Driving Change with Coaching
- Effectively Directing and Delegating as a Manager
- Managing Employee Development
- Facing the Management Challenges of Difficult Behavior and Diverse Teams
- Motivating Your Employees
- Communicating Vision to Your Employees
- Leading through Positive Influence
- Leveraging Emotional Intelligence
- Positive Atmosphere: Establishing an Engaged Workforce
- Building Innovation Cultures and Leaders
- Gender and Leadership
- How Culture Impacts Communication
- Facing and Resolving Conflict in the Workplace
- The Building Blocks of Building Trust
- Cultivating Relationships with Your Peers
- Bridging the Diversity Gap
- Your Role in Workplace Diversity
- Unleashing Personal and Team Creativity
- Strategies for Building a Cohesive Team
- Effective Team Communication
- Establishing Team Goals and Responsibilities, and Using Feedback Effectively
- Building the Foundation for an Effective Team
- Developing a Successful Team
- Encouraging Team Communication and Collaboration
- Handling Team Conflict
- Leading a Cross-functional Team

DEVELOPING YOURSELF

- Developing Yourself
- Becoming an Inspirational Leader
- Assessing Your Own Leadership Performance
- Building a Leadership Development Plan
- Building Personal Power through Influence
- The Art and Science of Communication
- Making an Impact with Non-verbal Communication
- Trust Building through Effective Communication
- Choosing the Right Interpersonal Communication Method to Make Your Point
- Become a Great Listener
- Using Active Listening in Workplace Situations
- Navigating Your Own Emotions
- Navigating Other People's Emotions
- Navigating the Workplace with Emotional Intelligence
- Polishing Your Feedback Skills
- Fundamentals of Business Storytelling
- Take a Deep Breath and Manage Your Stress
- Conquering the Challenges of Public Speaking
- Uncovering and Utilizing Your Talents and Skills



BENEFITS

Builds a more competitive and well-rounded workforce

Helps leaders overcome gender biases and build their leadership "brand"

Short training lessons are easy to integrate into busy schedules

Topics are structured to build leadership skills at all levels

FEATURES

Addresses the diverse workplace challenges faced by all levels of leaders

Lessons are short and easily accessible from a variety of devices

Lessons are primarily comprised of videos, short reading and learning activities, and thinking exercises from the best minds in business

Each lesson includes recommendations for additional in-depth reading and learning



BONUS: ACCESS TO OVER 700 LEADERSHIP VIDEOS



INVEST IN YOUR FIRM

SPECIAL ONLINE PROGRAM PROMOTION PRICING

ONLY \$799.00 PER PERSON

Offer ends December 31, 2018

VISA MASTERCARD AMERICAN EXPRESS DISCOVER All major credit cards



Preparing Law Leaders of Today to Meet the Challenges of Tomorrow

OUR UNIQUE COACHING PROGRAM

Don't look to us for a "kumbaya" engagement. We take your success very seriously, so we will only engage with those who have a similar committed attitude. We bring our combined experience in senior corporate leadership roles and executive coaching to the tough challenges legal firms currently face by developing practical solutions, elevating your overall performance and helping you create a high level of executive readiness. Our fresh, relevant, and cutting-edge insights have been hard-earned. We ask the right questions and work with your 360° circle of influencers to develop just the right approach so you can achieve Leadership Balance.™



Cathy M. Light, CEO
Leadership Balance

LEADERSHIP COACHING FOR INDIVIDUALS AND TEAMS

We offer one-on-one and small group coaching in six or twelve-month programs, including individual assessments and personal development plans, for:

- Firms, practice/industry sections, and administrative staff
- Managing partners
- Task force members
- Management committees

Coaching For Leadership Effectiveness



This holistic, interactive program helps individuals drive decision making through the mind, will, and heart. It results in organizations that produce high performers and measurable results more rapidly.



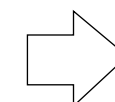
Leadership Balance facilitates individual change and development specific to organizational issues with specialization in leadership effectiveness, job commitment and confidence. As coaches for organizational change, we help the leader look at the way he or she currently does business and help identify qualities needed to manage more effectively.

SAMPLE 1:1 DISCUSSION

PREMISE

Even people of similar level and perceived capabilities have quite diverse "Ways of Being", i.e. ways of...

- Thinking of themselves and what's possible
- Relating to colleagues, customers and partners
- Conceiving their role's mission and M.O.
- Marshaling available resources



"Empathy-Challenged Hard Charger"

Profile: Driven, gets results. BUT, treats subordinates transactionally, peers suspiciously, bosses as if "proving self."

Impact: Hits ceiling. Doesn't uplift others. "A" players don't like working with.

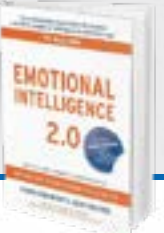








Development Needs: Act less from fear, insecurity or comparison. More authentic, approachable. Reframe vision of success to be less about "me" and more "we."



Get STARTED

We deliver co-developed programs designed to address the unique challenges facing your law firm.

SAMPLE PARTNER TRACK PROGRAM

<p>Month 1</p> <p>Introductions and What Your Team Assessment Results Reveal</p> 	<p>Month 2</p> <p>Firm Alignment 360°</p> 	<p>Month 3</p> <p>Beyond Billable Hours: Executive Brand & Readiness</p> 	<p>Month 4</p> <p>The Multigenerational Workforce</p>
<p>Month 5</p> <p>Strategic Drive</p> 	<p>Month 6</p> <p>Trust & Teambuilding</p> 	<p>Month 7</p> <p>Self-Monitoring/ Emotional Intelligence</p> 	<p>Month 8</p> <p>An Innovation Mindset for the Changing Legal Industry</p> 
<p>Month 9</p> <p>Communicating What Matters for Peak Performance</p> 	<p>Month 10</p> <p>The Powers of Wellness and Life Balance for Organizational Health</p> 	<p>Month 11</p> <p>Succession and Transition</p>	<p>Month 12</p> <p>Wrap up:</p> <ul style="list-style-type: none"> • Bringing it All Together • Graduation • Certification & Celebration

OTHER POPULAR TOPICS INCLUDE:

- Diversity, Equity and Inclusion
- Creating and Maintaining a Healthy Culture - For all!
- Practice and Industry Development
- Creating a Learning Organization

Sample Agenda



On-site Agenda for Partners' Leadership Balance 12-month Program

Wednesday, June 12th 1:1 Coaching Sessions
Embarcadero Conference Room

- 9:00 – 10:00.....KF
- 10:15 – 11:15BF
- 11:30 – 12:30JD
- 1:00 – 2:00.....JL
- 2:15 – 3:15.....RM
- 3:30 – 4:30.....PM

Thursday, June 13, 2013 – Program
Waterplace Conference Room

- 8:30 – 10:00.....Course Topic Facilitation
- 10:15 – 11:45Group Exercise & Firm Project Update
- Noon -12:30.....Working lunch
- 12:30 – 1:30.....Executive Session with Partner Participants only
(Managing Director and Executive Director leave)

Discussions around what's working (or not) in firm and how can this group help to improve organizational health and well-being

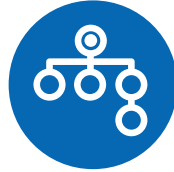
Upcoming Meetings:

- July 11th
- August 1st



We've done it for law firms - powerful results

CASE 1



Bringing together senior partners with leadership potential from disparate practice groups

Goal: To enhance and amplify their leadership skills to take on firm-wide leadership roles and design a collaborative working model

ACTION

Participated in customized development programs that included key leadership competencies, cross-practice projects, and 1:1 coaching.

RESULTS

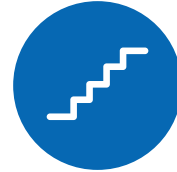
Partners now serve in key firm leadership roles, continue to meet and support each other's work while mentoring other future leaders.

"At Hanson Bridgett, we have been working with Leadership Balance® for two years now, and have found their vision, insight, and industry understanding of what leadership should be in law firms to be unmatched. Leadership Balance continues to add value and have impact across our firm: from formal leadership development programs to succession and transition planning, to 1:1 coaching with our partners. If you are considering any leadership or organizational development initiatives to help your firm not only survive but thrive, I highly recommend you contact them."

- Andrew Giacomini, Managing Partner



CASE 2



Rainmaker partner with poor interpersonal skills

Goal: Address negative working issues with staff, other partners and clients

ACTION

Coached to create awareness of impact of behavior; built new team; delegated responsibilities and diversified practice.

RESULTS

Partner has new, high-performing team, greatly improved relationships with staff and other partners, and new business clients and firm projects.

CASE 3



Retain long-term firm client who hired a new General Counsel

Goal: Avoid the RFP and retain the client

ACTION

Developed transition plan to build critical leadership in successor; identified and built team; created firm-wide communication plan.

RESULTS

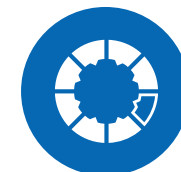
New general counsel in place; client Board Chair noted thoroughness and professionalism of transition of plan, commitment to client, and success of new team.

"I have seen first-hand the quality and results from what Leadership Balance® brings to develop and implement a plan to strengthen one's leadership qualities and communication skills on an individual or in a group setting. They are extremely diligent and focused on spotting and structuring solutions to address areas that require and can benefit from their collective expertise. In one situation, in particular, they worked tirelessly with a partner to address certain disruptive issues, resulting in a complete turnaround of attitude, converting a negative situation into a very positive outcome. Leadership Balance® has proven to be a significant and proactive resource to my firm."

- William Taylor, Former President Globalaw



CASE 4



High-potential Associate

Goal: Develop personal leadership and business development skills necessary to be successful at partner level

ACTION

Coached to create awareness of personal style and impact on relationships; created business plan to leverage client and specialty expertise marketing; developed approach to working productively with practice leader.

RESULTS

Associate exceeded goals for year, was recognized for improved personal style and relationship building, and has been promoted to Partner.

Let's Get Started...

Take control of your firm's future, today! Find out how customized programs from Leadership Balance® can help your firm stay relevant, and create a competitive, sustainable business for decades to come.

Contact us today to receive a complimentary 2019 Toolkit including:

- Emotional Intelligence Appraisal (EI) \$99 value
- Everything DiSC Work of Leaders Assessment.... \$108 value
- Our Exclusive LBq assessment..... \$99 value

To enroll today, or for more information,
visit us at leadershipbalance.com/partners-in-legal

For more information, call us at **866-864-8200.**

(Corporate volume pricing is available upon request.)



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