LEADER an

۲

A Guide to Client-Centricity, Culture Creation, and Collaboration.

MICHELE DESTEFANO



ABA Publishing

۲

()

()

Cover design by Carolina Martinez/ABA Design

The materials contained herein represent the opinions of the authors and/or the editors and should not be construed to be the views or opinions of the law firms or companies that such persons are in partnership with, associated with, or employed by, nor of the American Bar Association unless adopted pursuant to the bylaws of the Association.

Nothing contained in this book is to be considered as the rendering of legal advice for specific cases, and readers are responsible for obtaining such advice from their own legal counsel. This book is intended for educational and informational purposes only.

© 2024 Michele DeStefano. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of the publisher. For permission, complete the request form at www.americanbar.org/reprint or email ABA Publishing at copyright@americanbar.org.

Printed in the United States of America.

28 27 26 25 24 5 4 3 2 1

Library of Congress Cataloging-in-Publication Data

Names: DeStefano, Michele, author.

Title: Leader upheaval / Michele DeStefano.

Description: Chicago : American Bar Association, 2024. | Includes

bibliographical references and index. | Summary: "This book provides an actionable roadmap for leaders to enhance client-centricity, shift mindsets, and create the right teaming climate so that a culture of collaboration, innovation, and inclusivity can thrive. Derived from over 280 interviews with senior executives in professional services and their clients—along with hands on experience leading hundreds of multidisciplinary teams on innovation journeys—Professor DeStefano reveals the path to successful collaboration and innovation efforts in professional services, including how to avoid the pitfalls that lead to failure."--Provided by publisher.

- Identifiers: LCCN 2023056585 (print) | LCCN 2023056586 (ebook) | ISBN 9781639053490 (hardcover) | ISBN 9781639053506 (epub)
- Subjects: LCSH: Practice of law--Social aspects--United States. | Practice of law--Technological innovations--United States. | Lawyers--Effect of technological innovations on--United States. | Leadership--United States. | Success in business--United States.

Classification: LCC KF318 .D475 2024 (print) | LCC KF318 (ebook) | DDC 340.023/73--dc23/eng/20231214

- LC record available at https://lccn.loc.gov/2023056585
- LC ebook record available at https://lccn.loc.gov/2023056586

Discounts are available for books ordered in bulk. Special consideration is given to state bars, CLE programs, and other bar-related organizations. Inquire at Book Publishing, ABA Publishing, American Bar Association, 321 N. Clark Street, Chicago, Illinois 60654-7598.

www.shopABA.org

CONTENTS

Introduction vii

PART

Why You Should Hone the Mindset, Skill Set, and Behaviors of Innovators 1

- 1 The Key Priorities of Corporate Clients Require Innovation 3
 - A. Diversity, Equity, and Inclusion 4
 - B. Environment, Social, and Corporate Governance 7
 - C. Artificial Intelligence and Digital Transformation 10
 - D. Leader Upheaval and the Leadership Gap: A Call for Innovation and a New Mindset and Skill Set 16

2 New Expectations Call for a Move from *What* We Do to *How* We Do It 19

- A. Skills Delta Level 1: The C.O.S.T Skills (Sunk Costs) 23
- B. Skills Delta Level 2: Collaboration and Creative Problem
 Finding + Solving Skills 31
- C. Skills Delta Level 3: Innovation (Client-Centric, Adaptive, Inclusive Leaders with a Digital Mindset) 40
- **3** Client-Centricity: A Move from Services to Experiences and from Traditional to Adaptive Leadership 45
 - A. Client-Centricity: What It Is-And What It Is Not 48
 - B. Adaptive, Inclusive Leadership: A Move from the Possible to the "Adjacent Possible" 69

4 The New Value Equation in Professional Services: Honing the Mindset and Skill Set of an Innovator 75

- A. A ls for Attitude 79
- B. B Is for Behavior 83
- C. C Is for a Culture of Collaboration 85

iii

PART II

Leading Collaboration, Innovation, and Culture Change 91

5 First Things First: The Art of Collaboration and Change Starts with You

95

- A. Lead with Self-Awareness and Humility Because There Is a Lower-Case "i" in Teaming 96
- B. Lead by Following Because Only Those Who Are Inspired Can Inspire 99

6 The Three Rules of Engagement: Transforming Leadership Style and Enhancing Collaboration 111

- A. Rule #1: Open Mind 116
- B. Rule #2: Open Heart 124
- C. Rule #3: Open Door 131

7 S.A.F.E.T.Y.: A Recipe for Culture Creation 145

- A. Culture Creation Ingredient #1: S is for Survey and Set 147
- B. Culture Creation Ingredient #2: A is for Setting Expectations for Accountability 152
- C. Culture Creation Ingredients #3 and #4: Flatten, Empower, and Engage 154
- D. Culture Creation Ingredient #5: Think T as in Tiny 159
- E. Culture Creation Ingredient #6: Say "Yes, And" 163
- 8 There's Nothing Soft About Culture Creation: Sometimes to Be *for* the Birds, You Need to Be a *Big* Bird 169
 - A. When the Teaming Is Sour (Internal Dysfunction) 172
 - B. When the Team Is Not on the Same Problem Plane (Vertical Separation) 175
 - C. When the Team's Tunnel Vision Is Heading Toward Failure 179
 - D. And the List Goes on . . . 183

PART III

Managing Collaboration, Innovation, and Culture Change 185

9 Progress Needs Procedure: To Lead, You Must Manage 191

- A. There's Nothing Organic about Team Organization 192
- B. Teaming Takes Trust and Trust Takes Time 202

10 Managing Without a Marketing Plan and a Method Is Madness 225

- A. "Innovation Isn't an Idea Problem," It's a Marketing Problem 225
- B. The 3-4-5 Method[™] Is Designed for Change in Professional Services 234

11 Overview of The 3-4-5 Method[™] and Why It Works 255

- A. The 3-4-5 Method™: An Overview 256
- B. Why The 3-4-5 Method[™] Works 274

Conclusion 287

Appendix A: Recommended Further Reading and Watching 289

Appendix B: List of Figures 293

Appendix C: Research Methodology and Interview Characteristics 295

Notes 321

About the Author 399

Author's Bio 401

Acknowledgments 403

Index 407