It’s all about collaboration (Part 2)
How do I collaborate?

Part I of It’s all about collaboration focused on the compelling reasons for creating an environment of collaboration in a professional services firm and what that means. The two key conclusions are:

1. It’s extremely worthwhile
2. It’s difficult!

As far as the latter is concerned, it’s worth reiterating that collaboration is not just about assembling the various ‘parts’ of expertise to address a piece of work for a client – that’s project management; not least because the various parts of the solution could (depending on the nature of the assignment) complete the work required entirely independently of each other. Nor is collaboration just about delegating work. And collaboration isn’t simply cross-selling either.

This article focuses on the difficulty of collaboration, and answers the question a fee-earner might reasonably ask:

“Ok then, how do I collaborate?”

Because this is, to some extent, equivalent to eating an elephant, let’s break the question down into eight bite sized pieces:

1. Who do I collaborate with?

It’s unlikely that a fee-earner has time to collaborate with everyone in the firm. So, consider carefully which colleagues have pertinent expertise and experience that is relevant to your key clients. Research what type of clients they have successfully served and what sort of work that involved, and demonstrate that knowledge by inviting specific colleagues to collaborate on one (or more) of your clients where their expertise is likely to be of value to the client. In other words, identify opportunities for your chosen collaborators. Likewise, given the constraints of time, it is worth investing some effort in considering which colleagues are working with clients to whom you could bring value in terms of your expertise and experience. And, if the list of potential collaborators is long, invest a bit of time in working out who might be more interested and therefore receptive to a discussion.

2. Be a generous team player

When it comes to allocating financial recognition of client work, be fair and better still be generous in recognising the contribution of colleagues. In other words, don’t take all the credit. Similarly, consider the merit of involving colleagues more in the process of winning work such as presenting at pitch meetings, interacting with clients more etc, because more often than not clients buy strength and depth. Also, treat everyone as a partner – try to avoid imposing last-minute deadlines on colleagues, especially at weekends. Having this mindset increases the possibility of continued collaboration.

3. Be available

This might appear to be blindingly obvious, but in practice it’s important to be an active and visible collaborator. That means both making the time for yourself but also for others to collaborate. Part of being available is communicating openly and collegiately and regularly giving and asking for feedback.

4. Lead by example
The surest way to become a true and successful collaborator is to start with oneself and lead by example. It will soon catch on. Colleagues will want to work more with you, so it becomes a self-fulfilling outcome. Coaching others (obviously in a positive and nurturing manner) builds trust. Telegraphing wins achieved by a team rather than just by yourself enhances credibility and propensity to being seen as a worthwhile and valuable collaborator.

5  Non-billable hours

There are increasing numbers of professional services firms whose leaders are de-emphasising the importance of billable hours by a) decreasing billing hour targets and b) increasing the importance of accurately recording non-billable activity. To enhance collaboration, this includes investing in and recording time for coaching, joint meetings (internal and external), feedback sessions, giving advice, mentoring, collaboration initiatives and much more. The key is to focus on activities and their outcomes to continually facilitate and encourage investment in collaborative activity, and in so doing removing or reducing the barriers. Put simply, this is changing an approach of some hours being ‘just non-billable’ to those same hours being recognised as an investment in being competitive. Also remember, if it isn’t targeted or actively prioritised/required, it won’t get done!

6  Learning

Learning is an important example of non-billable activity which enhances collaboration, but the effort required to learn about colleagues’ clients takes time and effort. So, it makes sense to enable it to happen in the first place (as per 5) and to reward the effort, either financially or simply by giving due recognition.

7  Celebrating success

So simple but so rarely done to the extent to which it should. When collaboration is working and positive progress is being made, then find ways of celebrating success. It can be a range of actions, from something as simple as a private or public “Thank you” and/or “Well done” through to making sure that everyone’s contribution to a win is put up in lights.

And last but by no means least…

8  Don’t forget to collaborate with clients!

Perhaps stating the blindingly obvious, but we have observed many collaboration initiatives which completely omit the client. One method which many firms use is secondments which work well, although sometimes we find a lack of structure to secondments. Firms that do it really well have a briefing-in process, regular updates back at the office, and a full de-brief. Even without a secondment in place, collaborating with clients is imperative. Without this mindset and approach, collaboration can easily just turn into selling. So, look at any collaboration initiative almost exclusively from the client’s point of view and invest time in considering what might motivate them to engage even more than before. What areas of skills and expertise can your firm bring to bear which the client might be motivated to consider and, if all goes well, benefit from?