

Appendix: The coaching program

Can coaching help you?

Some lawyers prefer to work on business development independently, on their own terms and at their own pace. If you are one of them the *LegalBizDev Success Kit* includes everything you need to understand the basic principles of legal business development, and to apply them to your practice.

This independent approach will be perfect for some lawyers. However, in all honesty, based on our experience developing and delivering training and coaching programs for more than twenty years, we believe that the independent approach to business development is more likely to reflect good intentions than it is to produce follow-up and new business.

It's a little like buying a NordicTrack in a New Year's resolution to get more exercise. By February, there's a good chance that it's primary use will be as a clothes rack.

Now there are people who work out every day for years on their NordicTracks, and there are lawyers who will accomplish more working alone than they will working with a coach. For these admirable and disciplined individuals, we've written this edition of the *Desk Reference* to make working alone more productive.

But many others will find it is easier to reach their goals when they work with a coach who provides three things:

1. advice—professional counsel on how to deal with business development challenges
2. brainstorming—someone to bounce ideas off, to select the single best approach to every situation
3. accountability—someone who calls you every week to ask what you have accomplished

You could read every word in both books in this *Success Kit*, and then start on the others from our recommended books section, and all the internet resources listed near the end of the Resources and Readings section of this *Desk Reference*. But it will take a whole lot less time to work with a coach who's done that for you, and also experienced the real world application of those principles.

Mind you, we do not believe that our coaches have simple and 100% correct answers for every situation. You know your clients and prospects and we don't, so ultimately any decision about what is most likely to work

must come from you. But what we can do is brainstorm a number of alternatives, to help you pick activities most likely to work for you.

Finally, a coach aids in accountability by helping to structure the program to make sure tasks get accomplished. To take the exercise analogy one step further: Learning what you should do is a lot easier than going to the gym and actually doing it, day after day. A business development coach is like a personal trainer: knowing that you have an appointment gets business development on your urgent list. A little nagging can go a long way.

A coach can maximize the chances of getting new business in the long term, and may even help you to find new engagements within the eight weeks. The results will depend on your practice, and how much you are willing and able to put into the program.

This section describes what it is like to work with a LegalBizDev coach.

The single most important factor in success

The single most important factor in making this program a success is finding the time to follow up.

We can help you multiply the effects of your marketing time. But we can't help you develop new business if you don't have any marketing time.

In the next eight weeks, there will be many other demands on your time, and many good reasons why you cannot work on business development. But those same distractions will exist for the rest of your career. Marketing requires consistent effort, and you must get in the habit. If you fall behind one week, you must learn to make it up in the next one.

At least for the 8 weeks of this program, you must commit to an absolute minimum of 2 to 4 marketing hours per week. If you can't spare that much time, you should stop here and reschedule the coaching.

Types of coaching programs

LegalBizDev offers three types of coaching programs: Silver and Gold for individuals, and Platinum for groups of six or more. All are designed to help lawyers to increase new business, by building stronger relationships with current clients and new ones. But each program has slightly different features, as summarized in the table below:

Silver Coaching Program

- *The LegalBizDev Desk Reference*™.
- A 30 minute phone call every week from your business development coach to define action items, prioritize activities and assure the most efficient follow-up.
- An email from the coach after each call summarizing action items.
- Monthly one hour interactive group teleconference with Jim Hassett.

Gold Coaching Program

- The complete *LegalBizDev Success Kit*™.
- A phone call every week from your business development coach to define action items, prioritize activities and assure the most efficient follow-up. Calls are normally scheduled for 30 minutes, but can continue for as long as you like.
- Unlimited support preparing for business development meetings, including emails, customized question lists for clients, agendas, elevator speeches, PowerPoint presentations, and more.
- Weekly individual reports summarizing progress to date, and recommendations for next steps. (See the sample below.)
- Monthly one hour interactive group teleconference with Jim Hassett.

Platinum Coaching Program

- The complete *LegalBizDev Success Kit*™.
- A phone call every week from your business development coach to define action items, prioritize activities and assure the most efficient follow-up. Calls are normally scheduled for 30 minutes, but can continue for as long as you like.
- Unlimited support preparing for business development meetings, including emails, customized question lists for clients, agendas, elevator speeches, PowerPoint presentations, and more.
- Weekly group reports summarizing progress to date, and recommendations for next steps for each lawyer. (See the sample below.) These encourage accountability and a friendly competition.
- A planning meeting with decision makers at the beginning of the program to discuss firm goals and individual strengths and weaknesses.
- Face-to-face meetings, when mutually convenient.
- Email consultation with Jim Hassett to help brainstorm top challenges.
- A program review meeting and final report to summarize results and recommendations for next steps.
- Monthly one hour interactive group teleconference with Jim Hassett.

What should you do before the first call?

There is not a single thing that you **MUST** do before the first coaching call.

From years of working with lawyers, we know that no matter how strongly we feel about requiring work in advance, the simple fact is that some lawyers will not find time to complete it. So we designed a coaching process that works even if you can't find a single minute to get ready before the first meeting with your coach.

But if you can find a little time to prepare, you will get more out of the program. Although you can start filling in your *Coaching Action Plan* (below) during your first call, you will accomplish much more if you complete a draft before the call, and then discuss your ideas with your coach.

The vast majority of lawyers should focus first on current clients, and the quickest way for them to get started is to go to *Clients, current – Four steps to protect and increase business with current clients*. After you write a draft, you will work with your coach to assure that each action item is SMART: specific, measurable, achievable, relevant, and timed. If you get stumped about what to do with a particular client, or you have trouble prioritizing, plan to talk it over with your coach, and move on to the next item on the list.

Now look at that list, and ask how much time it will take per week. If the answer is equal to or greater than the time you have budgeted for the program, you're done with the draft.

But if you will have some time to work on new clients, go to *Summary – Ten steps to build your practice*. Again, fill out whatever action items seem obvious, and plan to work on the rest with your coach.

When your draft action plan is complete, you are ready to get the most out of your call. If you'd like additional background first, go to the audio self-study course at the end of this book, and complete the modules that are most relevant to your practice.

Weekly coaching calls

Agenda: The first coaching call

On Day 1 of the coaching, each lawyer will discuss these items with the coach. In the Gold and Platinum programs, we schedule 60 minutes for