

## TIP SHEETS FOR



<b>Tips to help lawyers get started</b>	<b>2</b>
<i>Prioritize relentlessly</i>	2
<i>Review basic principles quickly, then jump in</i>	3
<i>Work with others</i>	3
<i>Track activities and results</i>	4
<b>Tips to help business development pros get started</b>	<b>4</b>
<b>Tips for using the <i>Success Kit</i> in coaching</b>	<b>5</b>
<b>The top five times to use the <i>Desk Reference</i></b>	<b>7</b>
<b>Tips for planning how to use the <i>Success Kit</i> throughout your firm</b>	<b>8</b>
<i>Summary</i>	8
<i>Decision 1: How should you use the <i>Success Kit</i>?</i>	9
<i>Decision 2: Who should use the <i>Kit</i>?</i>	10
<i>What to do after your first program succeeds</i>	12
<b>Tips for running a pilot test of the <i>Success Kit</i></b>	<b>13</b>
<b>Tips for building commitment through group meetings with the audio CDs</b>	<b>14</b>

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## Tips to help lawyers get started

There are three major ways that lawyers use the *LegalBizDev Success Kit*:

1. To develop business with a coach
2. To develop business in a group
3. To develop business alone

If you will work with an external coach, you don't need to do a single thing before the first call. (But if you would like to prepare for the first call, you can see page 175 in the *Desk Reference*.) This document is aimed at lawyers who work without a coach, whether in groups or alone.

### ***Prioritize relentlessly***

When lawyers ask me about the most important advice on marketing, my answer is simple: Ignore good ideas. Lawyers are much too busy to spend time on ideas that are only good. To maximize the chances of success, each individual must focus on the very best ideas for their practice, their personality, and their schedule.

This requires relentless prioritization, and constantly returning to the question: "What should I do today to increase new business?" You must place the highest priority on tasks that are most likely to yield the type of clients you want to work with, and the types of matters you prefer to focus on.

How can you come up with the best list of activities for your unique situation? Review things that have worked in the past for you, for your partners, and for other firms. Do this quickly. Because every minute you spend planning is a minute you are not following up with clients. The *Success Kit* will help you by providing easy access to best practices from other firms and other professions. You can begin by reading these sections in the *Desk Reference*:

- Page 111, "Everything you need to know in seven words."
- Page 113, "Ten steps to build your practice" and "The top two things to do with current clients"

For more on this, see Chapter 1 in *Legal Business Development: A Step by Step Guide* and the blog post "Why lawyers should ignore good ideas" at [www.jimhassett.com](http://www.jimhassett.com). (You can go directly to that March 2008 item with this link [http://adverselling.typepad.com/how\\_law\\_firms\\_sell/2008/03/the-most-import.html](http://adverselling.typepad.com/how_law_firms_sell/2008/03/the-most-import.html))

***Review basic principles quickly, then jump in***

Many lawyers would rather read about marketing than to pick up the phone and call a client. If you are one of them, you must fight that tendency, and spend as little time as you can on studying basics. Just jump right in with one of these sections in the *Desk Reference*:

- For current clients - Page 30, “A checklist of best practices to increase satisfaction”
- For new clients - Page 33, “How to find new clients, step by step”

If you feel you need a little more background, listen to Module 2 in the audio: “Six Ways to Increase Results from Your Limited Marketing Time.” Then turn to one or more of these sections from the *Desk Reference*:

<b>For information on</b>	<b>See <i>The LegalBizDesk Reference</i></b>
Planning	<ul style="list-style-type: none"> <li>• Page 81, “Define your niche”</li> <li>• Page 82, “Define your ideal clients”</li> <li>• Page 83, “How much time do you need for business development”</li> </ul>
Follow-up	<ul style="list-style-type: none"> <li>• Page 56, “How to assure that you follow up consistently”</li> <li>• Page 61, “Sample reports to improve tracking”</li> </ul>
Questions to ask in meetings	<ul style="list-style-type: none"> <li>• Page 88, “Prepare for your next meeting by selecting questions from this list”</li> </ul>
For associates only	<ul style="list-style-type: none"> <li>• Page 16, “Eight steps to keep business development on track”</li> </ul>

As soon as you start to feel comfortable, then jump right in and start developing new business. You can always go back and fill in the foundation later, after you’ve had some success.

***Work with others***

Most lawyers will follow up more consistently if they work with other people. The group could be a formal committee including business development professionals, or it could be just two or three lawyers who meet for breakfast once a month. Working with a group provides social support and increases the accountability that leads to steady progress. No one wants to go to a meeting and report that they failed to follow up on all their action

items. The simple fact that you know you have a meeting coming up will spur you to action.

On the other hand, if you prefer working alone, or if that is your only option, make sure you don't stop marketing when other things come up. The next section will help.

### ***Track activities and results***

If you write down what you achieve, you will be able to see results, and will also be more likely to follow up consistently. This is especially critical if you are working alone. For specific examples of what your reports might look like, see the *Desk Reference*, page 61, "Sample reports to improve tracking." For more background, see *Legal Business Development: A Step by Step Guide*, page 102, "What gets measured gets done."

## **Tips to help business development pros get started**

*The LegalBizDev Success Kit* provides a library of resources at your fingertips, to help you help lawyers more efficiently. Does a lawyer have a first meeting coming up with a new client? Turn to page 73 in the *Desk Reference* for an agenda. Is someone looking for ways to re-connect with old law school classmates? See page 92. Do they want to increase referrals? Go to page 94.

The six modules on the CDs provide a basic overview of legal business development which you can lend to lawyers, or use yourself as a refresher course. Are you working with a lawyer who needs to step back and understand the big picture of how to find new clients? Encourage them to listen to the audio for Module 4: "How to find new clients: From prospecting to closing." Do you have someone who is wondering how much time to put into marketing? Direct them to Module 1: "How the legal market is changing, and what it means to you."

Of course, the key to using the *Success Kit* as a resource is to have a good sense of what it contains, and how it is organized. Start with page 7 in the *Desk Reference*: "How to use this *Desk Reference* and *Success Kit*." Then study the Table of Contents and the Index, and sample a few sections that catch your eye. Think of the *Kit* as a multimedia encyclopedia: not something you should read cover to cover, but rather something you can turn to whenever you need a ready resource.

If you want to use the *Success Kit* to offer suggestions on best practices to lawyers, make sure that you are familiar with the sections of the *Desk Reference* that lawyers use most often by reviewing the section below: “The top five times to use the *Desk Reference*.”

If you want to use the *Kit* in an internal coaching program, consider how to adapt the LegalBizDev coaching approach (*Desk Reference* pages 172-187) to your culture. If you would like to consider other suggestions for the best ways to use the *Kit* in your firm, see the section below: “Tips for planning how to use the Success Kit throughout your firm.”

If you are interested in learning more about how the LegalBizDev coaching system could help you increase business at your firm, contact us (800-498-7246 or [info@legalbizdev.com](mailto:info@legalbizdev.com)) for a quick reference about designing a pilot test program for internal coaching, for details of upcoming Train the Trainer sessions, or for a description of the *LegalBizDev Certified Coach* credential.

## Tips for using the *Success Kit* in coaching

*Adapt these steps to fit your firm’s culture and goals.*

1. You won’t get a second chance to make a first impression, so start out with the lawyers who are most likely to succeed. If a candidate is already a successful rainmaker, a small change in tactics could have a large effect on new business.
2. Avoid problem cases, at least until a track record of success has been established. Some lawyers will never be successful at business development, and if there are unrealistic expectations about what you can accomplish in a few weeks, coaching will fail and it will hurt your credibility.
3. Plan a series of 5 to 9 meetings of at least 30 minutes, ideally once a week. Lawyers will often prefer to meet once every few weeks, and the client is always right. However, if you can convince them to meet weekly, you are likely to achieve greater results.
4. Manage expectations. A program like this will improve relationships with current clients and new prospects, but it is likely to take some time for those relationships to produce new business.
5. At the first meeting, focus on a coaching action plan, as shown on page 177 in the *Desk Reference*.
6. If you want more background on the LegalBizDev approach, see pages 172-187 in the *Desk Reference*.
7. Try to get lawyers to focus on increasing satisfaction with current clients (“the low hanging fruit”) before looking for new clients.

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8. Whenever possible, refer lawyers to specific advice and best practices in the Desk Reference. (To assure that you know which sections are most likely to be useful, see the Tip Sheet named “The top five times to use the Desk Reference.”\*)
  9. After every session, summarize future action items in an email or formal report (see the sample on p. 182).
  10. Begin every subsequent meeting with a standard set of questions (starting from the questions on p. 178).
  11. Be flexible when lawyers need to reschedule. In our experience, many lawyers need to reschedule half the time, or more. Follow up in a low key non-intrusive way, but do follow up as often as you need to get back on the calendar.
  12. Be inflexible about your own schedule. Once you set a time to meet with a lawyer, stick to it if at all possible.
  13. If a lawyer reports new business, ask “Do you think the coaching program had anything to do with this new engagement?” If yes, publicize your success within the firm.
  14. Ask each lawyer whether he/she would like to have their own copy of the *Success Kit*, so that they can continue to use it to develop new business more efficiently.
  15. Check back every few months, and ask about new business since the last time you talked. For each new piece of business, ask: “Do you think the coaching program had anything to do with this new engagement?”
  16. Keep a running list of all the success from your program, and publicize success within the firm so that key lawyers and staff are aware of your results.

## The top five times to use the *Desk Reference*

*The LegalBizDev Desk Reference* includes over 50 sections, organized alphabetically, to make it easy for lawyers to review best practices that apply to each new business development opportunity.

*Success Kit* users should be particularly aware of the top five sections that are used most often in a typical business development program:

<i>When you need to</i>	<i>See page</i>	<i>For the section named</i>
Improve listening, ask better questions, and/or prepare for a business development meeting	88	Prepare for your next meeting by selecting questions from this list
Strengthen relationships with current clients	30	A checklist of best practices to increase satisfaction
Increase results from business development meetings	13	How to increase results by planning advances
Find new clients	33	How to find new clients, step by step
Prepare for a networking meeting	53	Six steps to create or improve your elevator speech

You may also want to familiarize yourself with the next ten, again listed in order of how frequently they are used:

<i>When you need to</i>	<i>See page</i>	<i>For the section named</i>
Increase referrals	95	A checklist of best practices for referral sources
Provide your services to the clients of other lawyers from your firm	49	Cross-selling – What works and what doesn't
Meet with a new client for the first time	73	Sample agenda for your first meeting with a new client
Increase results from conferences and networking meetings	77	Three steps to prepare for a conference or networking meeting

<i>When you need to</i>	<i>See page</i>	<i>For the section named</i>
Plan a business development campaign	82	Define your ideal clients
Re-establish connections with people you knew in law school	92	Six steps to re-connect with past clients and colleagues
Get more new business from your speaking engagements	102	Six steps to increase results from speeches
Get more new business from your publications	85	Five steps to increase results from writing articles and books
For women lawyers, consider what is different and why it matters	116	Survey findings for successful women rainmakers
For associates, create and implement a business development plan	16	Associates – Eight steps to keep business development on track

There are more than thirty additional sections that are not in these lists, so whenever a new business challenge arises, it is a good idea to see the Table of Contents and/or Index, to find other materials that can save time and increase results.

## **Tips for planning how to use the Success Kit throughout your firm**

### ***Summary***

- The *LegalBizDev Success Kit* can be used in a variety of ways to fit each firm's goals and culture.
- The first decision marketing leaders must make is whether to use the kit in coaching, with business development groups, or with individual lawyers working alone.
  - Coaching is the most effective strategy, but also requires the greatest commitment of time and money.
  - Working in a group is the next best choice even if it is just two or three lawyers who meet for breakfast once a month.
  - Working alone can be quite effective for some people, as long as they find ways to reduce the risk of failing to follow up.
- The second decision is who will use the kit: lawyers, business development staff, or both.



- When introducing the kit for the first time, the single most important factor in success is picking the right people, namely lawyers who have the time and motivation to work on business development.
- Even after the first test succeeds, leaders must continue to build marketing momentum, including such tactics as publicizing success internally, and helping to assure adequate resources to the most successful rainmakers.

### ***Decision 1: How should you use the Success Kit?***

When it comes to legal marketing, one size does not fit all. There are three major ways that lawyers use the *LegalBizDev Success Kit*:

1. To develop business with a coach
2. To develop business in a group
3. To develop business alone

So the first decision you need to make is which of these approaches is most likely to work in your firm, given its culture, goals, and resources. The three approaches are listed in their order of effectiveness: coaching first, then working in a group, then working alone. Unfortunately, this is also the order of their cost in time and money.

### **Pick the most aggressive approach that fits your culture**

You won't get a second chance to make a first impression, so when your firm starts working with any new approach to business development, it is important to maximize the chances of success with the first few people. If the first test is successful, the word will spread, and more lawyers will be willing to give it a try. If your program produces new business, its return on investment will be many times the initial cost. It would be penny wise and pound foolish to economize on that first test.

The best way to produce more business in less time is for lawyers to have the support of a coach -- a dedicated professional who brings expertise and commitment to the process, and provides accountability.

It's like hiring a coach at the gym. The simple fact that you have an appointment makes you more likely to show up on time and exercise. And by providing professional advice on your unique situation, coaches can make a big difference.

Coaches may work inside a firm's business development department, or as external consultants. Some coaches are trained and certified on the LegalBizDev approach (outlined on pages 172-187 of the *Desk Reference*; for details on certification programs, email [info@legalbizdev.com](mailto:info@legalbizdev.com)), some use other approaches.

We believe that the LegalBizDev system makes coaches more efficient and saves lawyers time. But we have assumed that some firms already have an approach that they are

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satisfied with, and so we designed the *Kit* to be used with those systems as well as our own.

But what if your firm does not have a culture that supports coaching, or the budget to pay for it? In that case we recommend that lawyers work in a group, whether it is a formal committee that includes business development professionals, or just two or three lawyers who meet for breakfast once a month.

Working with a group provides social support, increases accountability, and leads to steady progress. The simple fact that people know they have a meeting coming up will spur some people to action. No one wants to report that they failed to follow up on all their action items. Group meetings create a friendly competition to see who can get the most new business in the shortest period of time.

In some cases, neither coaching nor group meetings are possible or desirable. That's the time for lawyers to work alone. In theory, working alone may not be as good as the other options, but in practice it's much better than nothing.

## **Test and improve**

Generally, it is best to start small with one or more pilot tests. If the first few people who try the *Kit* experience positive results, the word will spread, and it will make it easier to recruit others.

Track the results of each program. In the long term, success must be measured by new business. But it can take months or years to get new legal clients, so it is important to measure leading indicators of success to see results more quickly. Typical measures include the time lawyers devote to business development, their ratings of the program, and the client advances they achieve. (For a discussion of advances, see page 13 of the *Desk Reference*. For sample report formats, see page 61.)

Constantly experiment to find the best approach for your group. What works for one practice group may fail for another, and tactics that work this year may fail next year when the competitive environment changes. Therefore, successful business development always requires monitoring results, and sometimes requires experimenting with something new. And each time you do, you will need to begin by selecting the first people to try a new approach.

## ***Decision 2: Who should use the Kit?***

First you will need to decide whether the *Kit* should be given both to lawyers and to the business development professionals who support them, or to just one of these groups. The answer will depend on your level of commitment and on your resources.

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The best answer is to give a copy of the *Kit* to everyone who wants one, both lawyers and staff. If that is not practical, you must decide which comes first:

1. the political and business benefits of giving the *Kit* directly to lawyers, who can spread the word when it helps them to bring in new business, or
2. the leverage you can get by giving a *Kit* to professionals who work with many lawyers.

Once you know what your approach is, the next step is to pick the right people for the first tests.

### **Pick the right people**

When the *Kit* is first introduced in a firm, the single most important factor in success is choosing the right people, the ones most likely to succeed and get the program off to a good start.

Motivation is the key. It goes back to the fundamental law of marketing: if you spend no time, you will get no results. And to consistently fit marketing into their overcrowded schedules, lawyers must be motivated to work on business development. When our consultants offer LegalBizDev coaching, we accept lawyers into the program only if they are willing and able to commit at least 2-5 hours per week to business development for eight weeks.

After motivation, the next most important factor is prior success. If participants are already successful rainmakers, they are more likely to be in a position to see results quickly. In a way, this seems counter-intuitive. There is a natural tendency to want to start a business development initiative with the people who “need it the most”; lawyers who have little history of success in business development, and perhaps little interest. Unfortunately, this group is the worst place to start.

Research on sales managers in other industries has found that most managers spend far too much time and effort with their worst performers. And no matter how hard managers try to help, that group still generates few new sales. In contrast, the most successful sales managers focus their time with top producers, where a minor improvement can produce a significant amount of new business.

Consider the math. If you start with a rainmaker who currently generates \$2 million in annual revenue, a 1% improvement will bring in \$20,000, and a 10% increase will bring in \$200,000. If you take a lawyer with a \$100,000 book of business, you would need a 20% improvement to generate that same \$20,000, and a 200% improvement to generate \$200,000.

Mind you, these successful rainmakers must also be interested in trying something new. Some rainmakers are perfectly happy with the way they operate, and skeptical of any offers of help. The best approach with these people is to pray for their health, and get out of their way so they keep bringing in the business that pays the rent. But there is another

group of rainmakers that are always looking for something new that will give them an edge. They are ideal candidates for the first groups.

Practice group leaders and other influential lawyers are also good candidates for an initial program, because when they spread the word of success, others will follow.

If you plan to begin with group coaching, consider picking several people from a single practice group or an office. This will encourage a friendly competition when they see the weekly reports of what other lawyers are doing.

### **How to recruit volunteers**

People are likely to have the greatest commitment and achieve the greatest results when they volunteer. If you want to encourage people to volunteer for your first program, consider:

- Distributing copies of the *Kit* to people who want to preview how the program works, and letting each individual decide whether or not to proceed with coaching.
- Lending the *Kit* to people for 10 minute tours, and offering to buy additional *Kits* for anyone who is interested.
- Encouraging people to preview the audio demo of the *Kit* and other material on the web at [www.legalbizdev.com](http://www.legalbizdev.com).
- Distributing brochures about the *Kit*.
- Organizing a lunch discussion of any module. Set up a computer, play CD1, and discuss the exercise in the *Desk Reference* at the end. (Most firms start with Module 2: “Six ways to increase results from your limited marketing time.”)
- Scheduling a LegalBizDev trainer to offer a workshop or webinar to generate interest in marketing in general, and in your particular program.

### ***What to do after your first program succeeds***

What should happen after you have launched a program that leads to more activity, increased enthusiasm, and new engagements? Is the work of marketing leaders done? Should you just step aside and wait for the congratulations?

Unfortunately, no. A marketing leader’s work is never done.

Successful programs sometimes create a boomerang effect by making lawyers feel busier than ever handling the new work, so they stop marketing. Of course, what lawyers should do instead is to work on delegation, so they can continue to generate more business and protect the long term health of the firm.

Marketing leaders must do whatever they can to assure a steady commitment to developing new business. Publicize success internally, via email or on your intranet.

Encourage people to put more time into business development. Make sure that top producers feel appreciated. Get them the help they need. Try to convince skeptical partners that marketing time is just as important as billable time.

And when your first program succeeds, keep pushing forward with the next one.

## **Tips for running a pilot test of the *Success Kit***

*Adapt these steps to fit your firm's culture and goals.*

### **Eleven steps for a pilot test with lawyers**

1. List several lawyers who are interested in business development, and open to trying new tools and tactics. Work first with those who have had some success in the past, since they are most likely to produce positive results, and create a good first impression.
2. Distribute color brochures about the Success Kit, and ask who is interested in seeing the Kit. (Note: Color brochures can be obtained from LegalBizDev or downloaded from [www.legalbizdev.com/products](http://www.legalbizdev.com/products).)
3. If the firm has already purchased a Kit, make sure lawyers understand that looking it over will not require any new expense.
4. Encourage lawyers to preview the audio demo and Success Kit samples on the web at [www.legalbizdev.com/products](http://www.legalbizdev.com/products).
5. Send an email like this

### **A new business development tool that you may want to borrow**

We recently purchased a copy of *The LegalBizDev Success Kit*, a multimedia reference tool that helps lawyers develop business more efficiently. It includes a mini-course on legal business development on three audio CDs, and an A to Z encyclopedia of advice for common legal marketing situations, including best practices other law firms are using to increase satisfaction for current clients, to find new clients, to develop elevator speeches, and much more.

Would you be interested in trying the “10 minute tour” that comes with the Kit to see if it might be useful in your practice?

6. When you get a response, lend the lawyer your Kit, direct them to the “Ten minute tour”\*, and set a deadline to get it back.

7. A few days later, ask if they have had a chance to look at the Kit, and what they thought.
8. If they feel it could be useful, give them a copy of “Tips for lawyers – How to get started”\*
9. A few days later, ask whether they would be interested in any of the approaches listed in the “Tips for Lawyers”: coaching, working in groups, or working alone.
10. If yes, follow up to make sure something happens, and consider obtaining a copy of the Kit for this lawyer.
11. Lend the Kit to someone else.

### **Six steps for a pilot test with business development professionals**

1. Select a business development professional who is interested in new tools, and able to find a little time.
2. Lend him/her your Kit, and give them a copy of the “Ten minute tour”\*
3. A few days later, ask if they have had a chance to look at the Kit, and what they thought.
4. If they feel the Kit could be useful, ask whether they would like to hold on to the Kit for a few days or weeks. Set a deadline to get your Kit back so that you can continue to use it yourself and lend it to others.
5. Give them a copy of: “Tips for business development professionals – How to get started with the *Success Kit*”\*
6. Check back a week or two later to discuss how they might use the Kit, and whether the firm could benefit if they had their own copy.

## **Tips for building commitment through group meetings with the audio CDs**

1. Schedule a one hour lunch meeting to promote business development by seeing and discussing one of the PowerPoint presentations on the Success Kit CDs.
2. Offer free food.
3. Decide which module to show first
  - a. If your group accepts the importance of marketing and is ready to discuss *how* to market more efficiently, preview Module 2 on CD1 “Six ways to increase results from your limited marketing time” (25 minutes) to be sure this is the best way to meet your need. If it does, play it during the lunch meeting, and discuss the Module 2 exercise on page 139 of the *Desk Reference*.

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- b. If your group first needs to be convinced to put more time into business development, preview Module 1 on CD1 “How the legal market is changing and what it means to you” (27 minutes) to be sure this is the best way to meet your need. If it does, play it during the lunch meeting, and discuss the Module 1 exercise on page 131 of the *Desk Reference*.
  4. To prepare for the presentation
    - a. Set up a computer monitor, ideally with a projector and high quality audio.
    - b. Do a test run with to make sure that all participants will be able to see and hear the presentation.
    - c. If you have any issues using the CDs, see the instructions on page 118 in the *Desk Reference*.
  5. Ask whether participants would be interested in additional lunches to repeat this process with other modules (listed on page 10 of the *Desk Reference*). Note: Playing CDs for a group will be most successful for Modules 1, 2, 3, 4 and 6. Module 5 (elevator speeches) is only 5 minutes long, and ends with a much more demanding interactive exercise. It would be difficult to conduct the exercise in a group setting, unless you practice in advance, and limit the exercise to a single volunteer.
  6. Ask whether some or all of the people in the room would be interested in setting up regular meetings and/or reports to support business development. (See the *Desk Reference* pages 57 and 61 for suggestions.)

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