



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.
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.

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