

Business Development Inc.'s Marquee Training and Coaching Program

Client Development & Relationship Management - Getting New Business in the Door©

Lawyers, law firms and other professional services firms are facing intense competitive challenges and opportunities in today's marketplace. These days, each and every Partner has a role in contributing to their firm's growth and success – it is no longer optional. Understanding the business development process intimately and maximizing each Partner's role and contribution in this area is crucial to continued success.

Program Description:

This highly tailored and interactive workshop measurably increases participating lawyers' and the firm's book of business, improves client development skills and client service. This program focuses on integrating into each participant's practice, successful and systematic strategies and tactics that secure, develop and advance relationships with appropriate contacts. Emphasis is placed on making the most of each participants personal client development style, areas of contribution and selling or service skills by developing a personal routine and pipeline for: whom to target for work; where to find them; how to approach; what and how to communicate; and how to follow-up as appropriate. In some states, this program comes with [CLE credits](#) (up to 14 depending upon the jurisdiction).

Content:

The objective of this program is to bring measurable new business in the door. Our past results show that this program yields a minimum of five dollars returned to the firm for every dollar invested in the program. Overall topics include:

- Definitively defining the marketing, "sales"/client development and service processes
- How to find clients, cases and develop new business relationships – what works, [what's ethical and professional](#) and best practices
- Appropriate ways to position for and "ask" for business
- A real-life client pitch
- Developing and pitching value-added services and client service enhancements
- Creating a personal approach, sales pipeline and system
- Pulling it all together: real-life application and practice with personal coaching
- Six individual follow-up session to help embed into practice
- As part of the program, each participant [receives a copy of the comprehensive 1000-page reference book and CD-ROM](#) – the most definitive handbook on the subject which is used as a career reference guide in the future.

Length and Format:

Depending upon the firm and the level of motivation of participants, the total time commitment for each of the 12 participating lawyers is approximately 15-25 hours spread over approximately 12-18 weeks. Following the completion of two on-line [pre-workshop questionnaires](#), review, analysis and pre-meeting interviews with each of the 12 program participants - this program generally proceed as follows:

- A 1.5 day group session is held where a real pitch is practiced
- A list of group and individual action commitments is made
- Followed by 1.5 hour individual, private coaching sessions to set up their efforts and pipeline
- In the 4-8 week interim, 3 to 4 personal coaching and follow-up sessions via telephone/e-mail for each participant and their action plan/pipeline
- Approximately 2 months later, a 3 hour group follow-up session is held

- Followed by another series of hour-long individual, private coaching sessions.
- Continued monthly coaching, quarterly meetings or other follow-up schedule established (as firm desires)
- A summary report of “Program Evaluations” and “Revenue Results” is provided to firm.

Number of Participants:

Due to the highly interactive, tailored nature of this program, the best results occur when the program consists of a maximum of 12 attorneys.

Instructor and Fee:

The trainer, Julie Savarino, is an attorney, master trainer and client development expert who has trained over 3,000 lawyers and other professional service providers in her methods worldwide – [About Julie Savarino](#). This program comes with a **complete satisfaction or your money back guarantee** (which no client has ever activated in Business Development Inc.'s almost 30 year history) – [What Clients Say](#).

IS THIS PROGRAM APPROPRIATE and/or**WOULD THIS PROGRAM BE USEFUL FOR MY/OUR FIRM?**

TO ASSESS INTEREST, CONSIDER COPYING, EDITING AND DISTRIBUTING A [SAMPLE MEMO](#) TO SEE IF THERE IS ENOUGH INTEREST AND DESIRE IN YOUR FIRM TO JUSTIFY THE INVESTMENT OF TIME AND RESOURCES FOR THIS PROGRAM.

Questions or Comments?

Contact Julie Savarino at Julie@BusDevInc.com; Telephone (734) 668-7008

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Time-Proven Training & Coaching Program That Gets Results!

*Business Development Inc.'s Marquee Workshop—
A Comprehensive Master Class:*

CLIENT DEVELOPMENT & RELATIONSHIP MANAGEMENT— GETTING NEW BUSINESS IN THE DOOR®

*Pre-Approved in New York for 13 Hours of CLE Credits and 1 Hour Ethics Credit
& Comes with Complete Satisfaction or Money-Back Guarantee*

PROGRAM DESCRIPTION:

The bottom-line objective of this program is to bring measurable new business in the door. Our past results show that this program yields a minimum of five dollars returned to the firm for every dollar invested in the program. Due to the highly interactive, tailored nature of this program, the best results occur when the program consists of a maximum of 12 attorney participants. Even though all lawyers share some commonalities, each attorney is unique and faces numerous business development pressures, challenges and opportunities in today's legal marketplace. This highly interactive workshop increases each participant's book of business, enhances current levels of service and improves client development skills. The program focuses on integrating into each participant's practice, successful and systematic strategies on how to secure and enhance relationships; whom to target for work; how to approach them; what to communicate and how to get new matters in the door. Emphasis is placed on enhancing each lawyer's personal client development style, communication skills, and creating a systematic sales approach for each participant.

PROGRAM FORMAT & LENGTH:

Following the completion of a **pre-workshop questionnaire** and personal style inventory by each participant, pre-training **assessment interviews** are held with each participant in person. Then, an analysis, review and preparation phase occurs before a **1.5-day group session** is held. Immediately following the group session, each participant and/or client team has one and-a-half hour private, video-feedback **coaching session**. Telephone counseling occurs after the first sessions. Approximately 6 to 8 weeks later, a **group follow-up session** is held, with **another set of individual coaching sessions**. **Unlimited personal coaching** by telephone is available thereafter. **Workshop evaluations are completed; results are tallied and reported to firm management. The total time commitment required for participating lawyers is approximately 18 to 25 hours spread over approximately 17 weeks.**

SUMMARY TABLE OF CONTENTS FROM 1,000-PAGE HANDBOOK & CD-ROM:

(A copy of which each participating attorney receives)

PROGRAM AGENDA

Describes the format for the 1.5 day group session and the individual, 90-minute, private coaching sessions held for each participant immediately following.

PROGRAM OBJECTIVES

Indicates what will be accomplished in the group & individual sessions and the follow-up steps implemented within the next 6-8 weeks.

QUESTIONNAIRE TALLY

Includes non-attributed responses from all 12 participating attorneys to the Pre-Workshop Questionnaire & Personal Style Inventory (a Myers-Briggs testing instrument), describing what they have done to develop business, what works for them, possible prospective clients and what they want to get out of this program.

(Due to the size of the entire handbook—1,000 pages, listed below are the handbook subsections only)

INTRODUCTORY MATERIALS

- The Current Marketplace for Lawyers & Law Firms
- The Business Development Process — Difference Between Marketing, Selling & Client Service
- Effective Business Development *Strategies* —What Works, What Doesn't
- Business Development *Tactics* That Generate Results

PERSONAL DISCIPLINE REQUIRED

- Your Attitude & Disposition Towards "Marketing"
- Making Time to Market, Service & Develop Clients
- Adapting Your Existing Habits and/or Routines

CLIENT SERVICE FOR LAWYERS & LAW FIRMS

- The "Cradle-to-Grave" Client Service Process
- Standards of Excellence from Cradle-to-Grave
- Key Client Relationship Management Techniques
- Client Satisfaction Surveys & Reviews
- Effective Client Service Teams & Practice Groups

MARKETING MATERIALS

- Your Market "Position"
- Required Investments
- Identifying "Ideal" Clients
- Using Market Research Effectively
- Benchmarks & "Best Practices" for the Most Effective Marketing Tools
- Measuring Success at Firm and Attorney Levels

CLIENT DEVELOPMENT (A.K.A. SELLING LEGAL SERVICES)—

STEP 1 – *Understanding Interpersonal Communications & Personal Styles*

STEP 2 – *Making the Most of Your Contacts:*

- How Legal Services Are Purchased
- Identifying & Finding New Opportunities
- How to Meet Prospective New Clients
- Networking Skills

SUMMARY TABLE OF CONTENTS FROM 1,000-PAGE HANDBOOK & CD-ROM:

(A copy of which each participating attorney receives)

(Continued)

STEP 3 – “Getting” Information From Clients & Prospective Clients:

- Finding Your Ideal Client & Evaluating New Opportunities
- The Lawyer’s Selection Criteria
- Discovering Clients’ Needs
- The 10-Step Discovery Process™

STEP 4 – Designing Solutions & Client Legal Service Plans:

- The Client’s Selection Criteria & Decision-Making Process
- Attorney-Initiated Proposals — SOQs or Statements of Qualifications
- Case Management & Budgeting Techniques

STEP 5 – “Giving” Information to Clients & Prospective Clients:

- The Proposal Process (From Formal to Informal)
- The Role of Marketing Staff
- Drafting a Winning RFP (Request for Proposal) Document
- Preparing a Pitch (a.k.a. Beauty Contest)
- Presenting & Making the Pitch
- Presentation Skills

STEP 6 – Reaching a Decision & Getting the Matter in the Door:

- Asking for the Business
- Necessary Follow-Up
- Contact Management Tools & Techniques

APPLYING IT TO YOU

- For Program & Group Session/Workshop
- Real-Life Client “Case Study” *(Each is Unique to Firm and Participating Lawyers)*

COACHING SESSIONS

- Agenda for Private Coaching Sessions *(Marketing Directors Often Participate)*
- My Practice Development “Inventory”
- Client & Prospective Client Interview Tools
- Marketing & Client Development Action Plans
- My Follow-Up System

ADDITIONAL REFERENCE MATERIALS

- CLE - Continuing Legal Education - Forms & Memos of Credit Approval
- ABA Model Rules of Professional Responsibility
- Templates, Forms, Samples & Examples
(All Are Also Utilized Throughout the Handbook)
- About Julie Savarino & Relevant Articles
- Bibliography and Sources

PROGRAM INSTRUCTOR:

The trainer, Julie Savarino, is an attorney and client development specialist who has trained over 3,000 lawyers and other professionals worldwide.

**For more information, please visit www.BusDevInc.com
or call Julie Savarino at (734) 668-7008.**

**BUSINESS
DEVELOPMENT
INC.**

CLIENT REFERENCES:

"Having participated in two different, intense training programs on 'Client Development', there is no question that Julie Savarino's program is far superior. The training was excellent but what really made the difference in results was the knowledgeable, methodical and regular coaching over time. The time and effort Julie made to understand my practice, identify and overcome hurdles made all the difference in my ability to get great results from the program. The other training program without any individualized coaching over time was much less effective. I highly recommend Julie Savarino's training and coaching program for law firm partners."

— *R. Jay Fortin, Partner, Curtis Mallet-Prevost, Colt & Mosle LLP*, New York

"As a seasoned litigation attorney with a national practice, I used to be skeptical about marketing training and how my practice could benefit from these programs. However, since participating in Julie Savarino's 'Client Development & Relationship Management' training program over three years ago, I have implemented many of the strategies and my practice continues to be increasingly profitable."

— *Edward Novak, Partner, Quarles & Brady Streich Lang*, Phoenix

"Business Development Inc.'s training programs for lawyers are excellent. I recommend them highly."

— *Ralph Baxter, Managing Partner, Orrick Herrington & Sutcliffe*, San Francisco

"Our firm is world-renowned as first-rate. Even so, we are constantly improving and the business development program you conducted for our firm was excellent."

— *Glenn West, Managing Partner - Dallas Office, Weil Gotshal & Manges*, New York

"Our firm has a reputation of being an intellectual property powerhouse with world-class clients and lawyers. After the firm's partners participate in Julie Savarino's business development workshops, the incremental changes make a significant impact on making our practice even stronger, especially with existing clients and relationships."

— *Gwen Bey, Director of Administration, Kenyon & Kenyon*, New York

"To provide effective workshops for all of our firm's diverse practice areas, an intense amount of customization and tailoring was necessary. Julie Savarino made the effort to adapt each program to fit each group's varied needs and unique leadership which produced outstanding results."

— *John Sapp, Former Managing Partner, Michael Best & Friedrich*, Milwaukee

"Even some of our firm's most important rainmakers thought your program was valuable and provided insights."

— *Clive Cummis, Founding Partner and Chairman,*

Sills Cummis Zuckerman Radin Tischman Epstein & Gross, Newark

"I have worked with Julie Savarino of Business Development Inc. at both of my former firms and had great success. Both Julie and her program were well received by the attorneys. The attorneys actually applied what they learned and we have been able to measure the results in new matters and clients. I highly recommend her program."

— *Coral-Mary Southam, Western Region Marketing Director, Greenberg Traurig*, Los Angeles

**For more information, please visit www.BusDevInc.com
or call Julie Savarino at (734) 668-7008.**