



SCGLELEGAL<sup>®</sup>  
A WORLDWIDE NETWORK OF LEADING LAW FIRMS

# WELCOME TO THE 2026 New Partner Institute

Business of Law and Business Development Program  
for SCG Legal Member Firms

[scglegal.com](http://scglegal.com)

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# THE NPI MODULES

INTRODUCTIONS & BUILDING  
A STRONG FOUNDATION

PRACTICE MANAGEMENT &  
PROCESS IMPROVEMENT

LEADERSHIP

PLANNING FOR SUCCESS

## NPI Faculty

Catherine Alman MacDonagh



Kyla Sandwith



# INTRODUCTIONS & BUILDING A STRONG FOUNDATION

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## Today's Program



Marketing and sales



Effective introductions

<https://www.kinesisinc.com/sales-marketing-compare-chart/>

THE DIFFERENCE BETWEEN <b>sales + marketing</b>	
Centers around the present	Centers around the future
Focused on one-to-one transactions	Focused on one-to-many transactions
Meets needs in an opportunistic manner	Meets needs in a strategic manner
Makes a push	Pulls people in
Depends on tried-and-true best practices	Uses constantly evolving tools and tactics
Allows for a two-way dialogue	Directs one-way messages
Is driven by human interaction	Is driven by metrics
Provides short-term advantage	Facilitates long-term sustainable success

FIRM Guidance

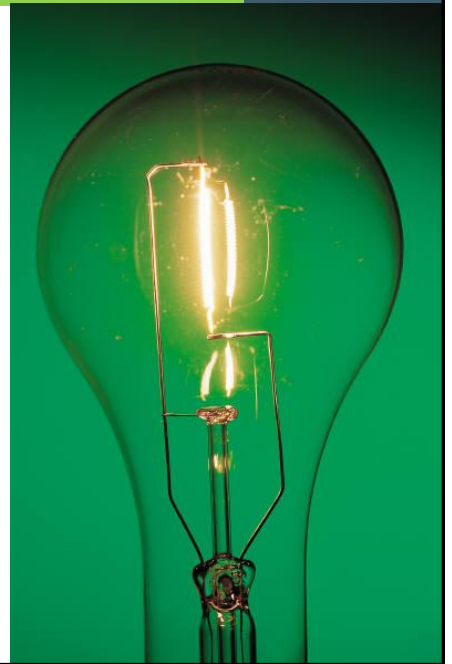
LEGAL LEAN SIGMA<sup>®</sup>  
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# I Say Sales, You Think...?



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# Sales Defined

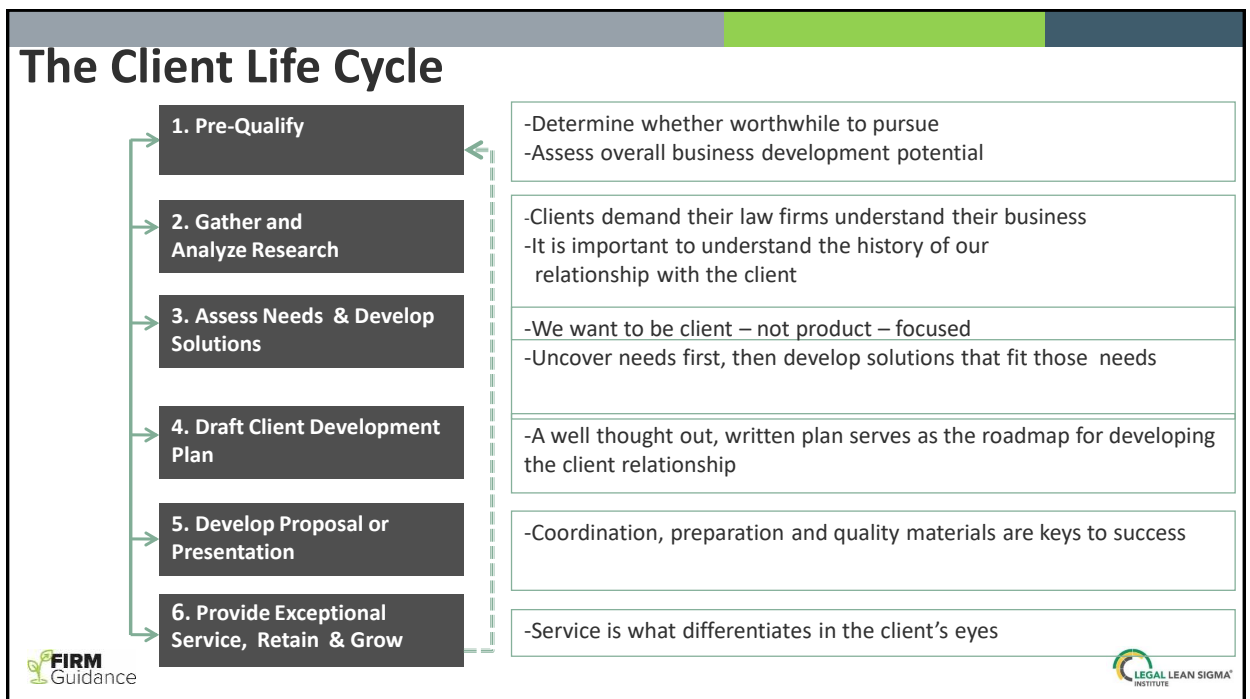
- Asking
- Listening
- Being helpful
- Uncovering and addressing a need
- Relationship building
- Client service



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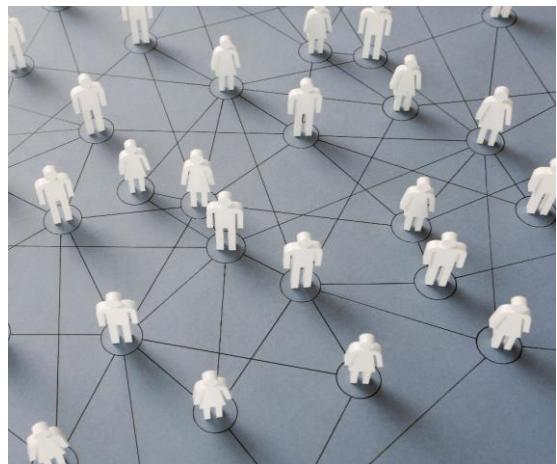
## Top 5 Keys to Success

- Attitude
- Invest time wisely
- Passion
- Overcome obstacles
- Likeability - authenticity



## Selling - Inside & Out

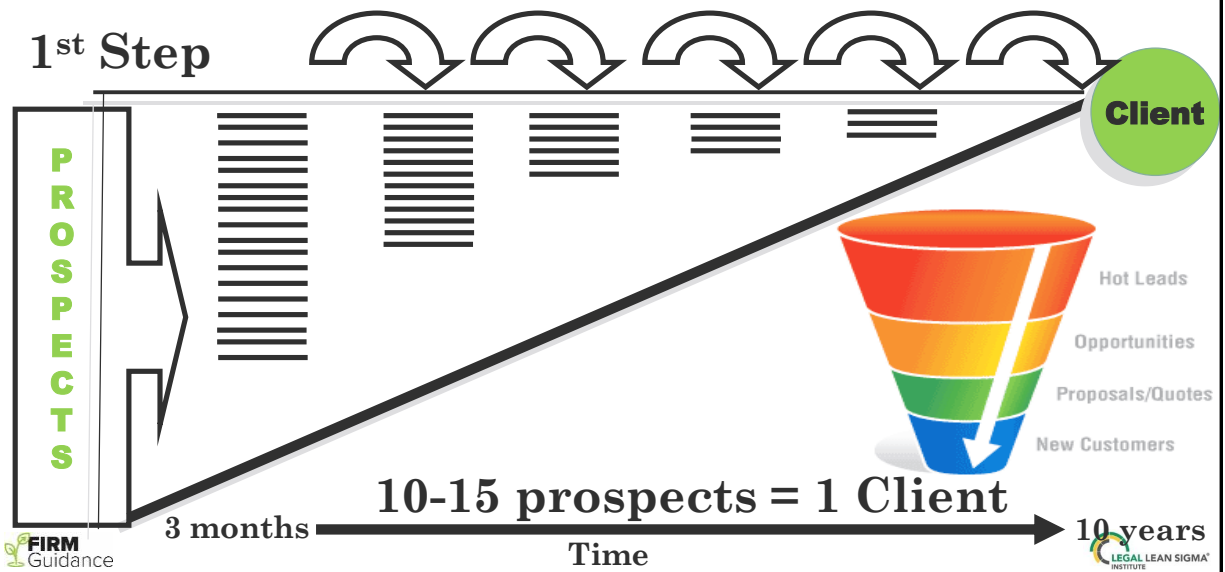
- Connect personally
- Inside
  - Referral sources
  - Teams
  - Cross selling
- Out
  - Clients
  - Prospects
  - Referral Sources



## What's Effective

- Stay tuned to WII FM
- Ask good questions
- Listen. Listen. Listen.
- Be prepared
- Develop your skills
  - Communication styles
  - Personality types
  - Memorable introductions (aka the "elevator speech")

## Client Development: The Sales Cycle



## Making - and Managing - Time

- Engage in effective activities
- Manage contacts, projects, time well
- Select targets
- Assess & qualify
- Forge, maintain and grow relationships

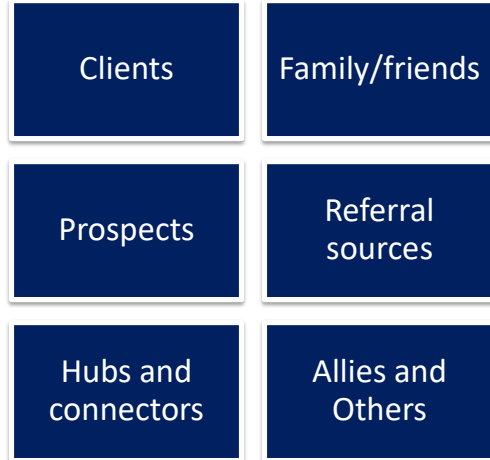
## Get Organized (or Reorganized)

- Clean up your contacts
- Categorize contacts
- Determine your targets and priorities



## Categorize Targets

- Data hygiene is critical!
- Develop a sustainable system



## Focus on Referrals

When selecting firms, in-house counsel rely primarily on personal referrals from the following sources (*top 2 choices selected*):

- Recommendations from current outside counsel **(79%)** internal and external
- Company approved list (50.4%)
- Ask in-house counsel at their company (49.6%)
- Ask in-house counsel at other companies (48.9%)

## Five Steps to a Referral



## Ask Good Qs, Identify Opportunities

- What work are you currently doing? What work are other firms doing for you?
- What are the trends/issues impacting your industry?
- What are your future plans? What are your opportunities?
- Are you aware of all the firm's capabilities?
- What are your goals near/longer term? Career aspirations?
- What do they want in a lawyer/firm?
- Are there seminars or CLE programs you could deliver to that would be helpful?

## Good Responses



## The Fortune is in the Follow Up

- Build in the follow up to each contact
  - Be clear
  - Make it time bound
- Use the system that works for you
  - Call sheets
  - CRM
  - Outlook
    - Calendar
    - Action items – use those flags!
- TAKE ACTION!

# Elevator Speech Workshop

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“Hello”



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# The Benefits of an Effective Introduction

Your elevator speech is your succinct introduction and description of who you are and what you do.

It is your opportunity to define (or redefine) your personal brand or your reputation.

Communicating your elevator speech to others allows them to remember how you help people.

Other people can literally be your commercial!



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## “So, what do you do?”

**ELEVATOR SPEECH WORKSHEET**

<p><b>What it is</b></p> <ul style="list-style-type: none"> <li>• 20-30 seconds</li> <li>• A succinct soundbite</li> <li>• Memorable</li> <li>• Spotlights something unique about you</li> <li>• Focused on what you offer and the benefits of working with you</li> <li>• Delivered effortlessly and naturally</li> </ul> <p><b>Guidelines</b></p> <ul style="list-style-type: none"> <li>• Keep it short</li> <li>• Think “tagline”</li> <li>• Describe yourself and what you offer</li> <li>• Solve a problem</li> <li>• Offer a vivid example</li> <li>• Lay out the benefits</li> <li>• Be excited about your work!</li> <li>• Practice makes perfect</li> <li>• Use this worksheet to get started</li> <li>• Practice – out LOUD</li> </ul> <p>What are your deliverables? Identify services or features:</p> <p>Write a list of benefits your clients derive from working with you (make sure they pass the “so what?” test:</p> <p>Combine the deliverables with the benefits to write your 15-25 second elevator pitch. PRACTICE IT until you can say it effortlessly.</p>	<p><b>Rules</b></p> <ul style="list-style-type: none"> <li>• Must have a hook - something that inspires people to want to learn more about you</li> <li>• Tell your listener why you are interested in them</li> <li>• Must pass the “so what?” test</li> <li>• Make it powerful and focused on what you can do for others</li> <li>• Write</li> <li>• No: “I’m a partner/counsel/associate”</li> <li>• No: sales pitch</li> <li>• No: legalese</li> <li>• Generic for all purpose, specific for events / opportunities</li> <li>• Try this: my name is _____ and I help _____</li> <li>• Feature, verb/action, benefit</li> </ul> <ul style="list-style-type: none"> <li>■ 20-30 seconds</li> <li>■ A succinct soundbite</li> <li>■ Memorable</li> <li>■ Spotlights something unique about you</li> <li>■ Focused on what you offer and the benefits of working with you</li> <li>■ Delivered effortlessly and naturally</li> </ul>
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## Examples

“I’m the acquisition go-to for medium sized businesses and I enjoy studying desert wildflowers when I’m not helping clients avoid (or handle) trouble.”

“I’m a wild life and nature photographer . . . on the weekends. And a tax attorney helping my clients navigate the code on the other days of the week.”



## The Rules

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It must pass the “so what?” test.

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Try not leading with “I’m a lawyer.”

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No sales pitch.

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No legal-ease!

## Guidelines

- Consider the audience
- Keep it short
- Think “tagline”
- Describe yourself and what you offer
- Solve a problem
- Offer a vivid example
- Lay out the benefits-F/V/B
- Be excited about your work!
- Practice makes perfect
- Use this worksheet to get started
- Practice – out LOUD

## Elevator Speech Workshop

- What are your deliverables?
  - Are services or features clear?
- How do clients/SCG referrers benefit from working with you?
  - Make sure they pass the “so what?” test
- Combine the deliverables with the benefits
  - Add what is unique about you
  - Craft/refine your 15-25 second elevator pitch
- Practice in the breakout, then you’ll introduce yourself to the group!

## Introductions – 15-25 seconds

- Name
- Firm
- Service area(s)
- Referrer benefit(s)
- Something unique about you

## Contact



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