



WELCOME TO THE 2024-2025 New Partner Institute

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

scglegal.com

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Alina Gorokhovsky



Chief Executive Officer

Phone: 202.580.6527

Email: agorokhovsky@scglegal.com



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THE NPI MODULES

INTRODUCTIONS & BUILDING
A STRONG FOUNDATION

PRACTICE MANAGEMENT &
PROCESS IMPROVEMENT

LEADERSHIP

PLANNING FOR SUCCESS



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NPI Faculty

Catherine Alman MacDonagh



Kyla Sandwith



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INTRODUCTIONS & BUILDING A STRONG FOUNDATION



Catherine Alman MacDonagh, JD
Catherine@LegalLeanSigma.com



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Today's Program

- Marketing and sales
- Effective introductions



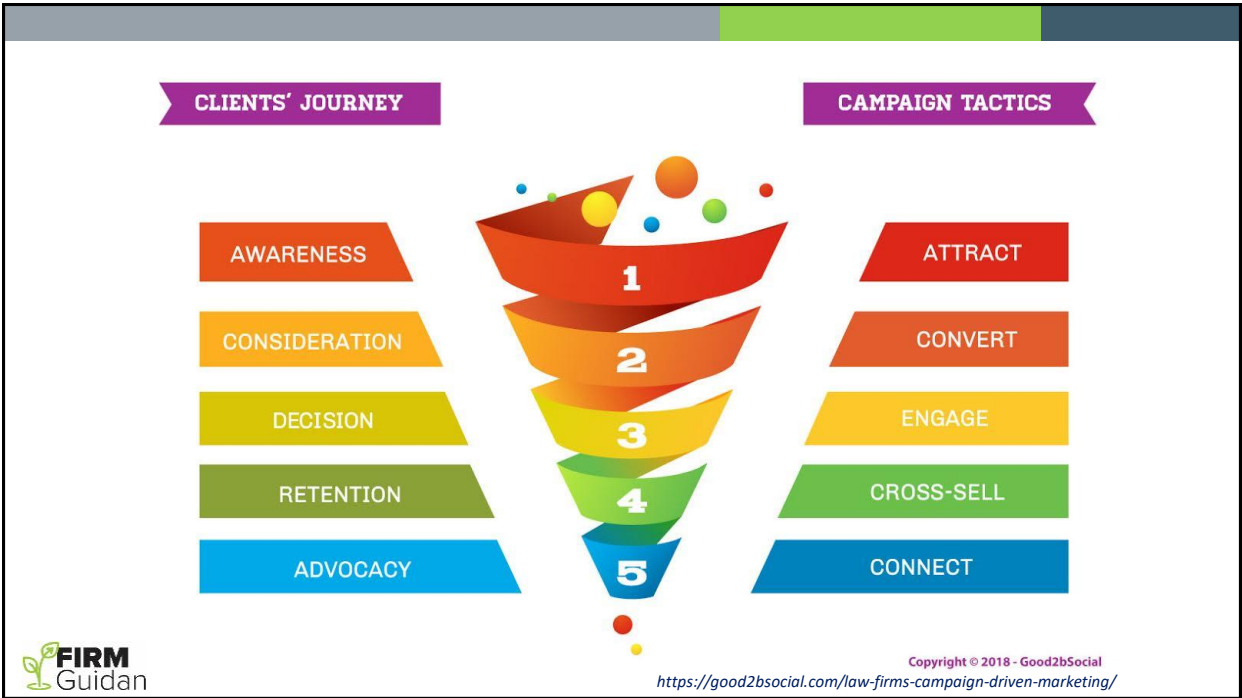
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<https://www.kinesisinc.com/sales-marketing-compare-chart/>

THE DIFFERENCE BETWEEN sales + marketing	
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



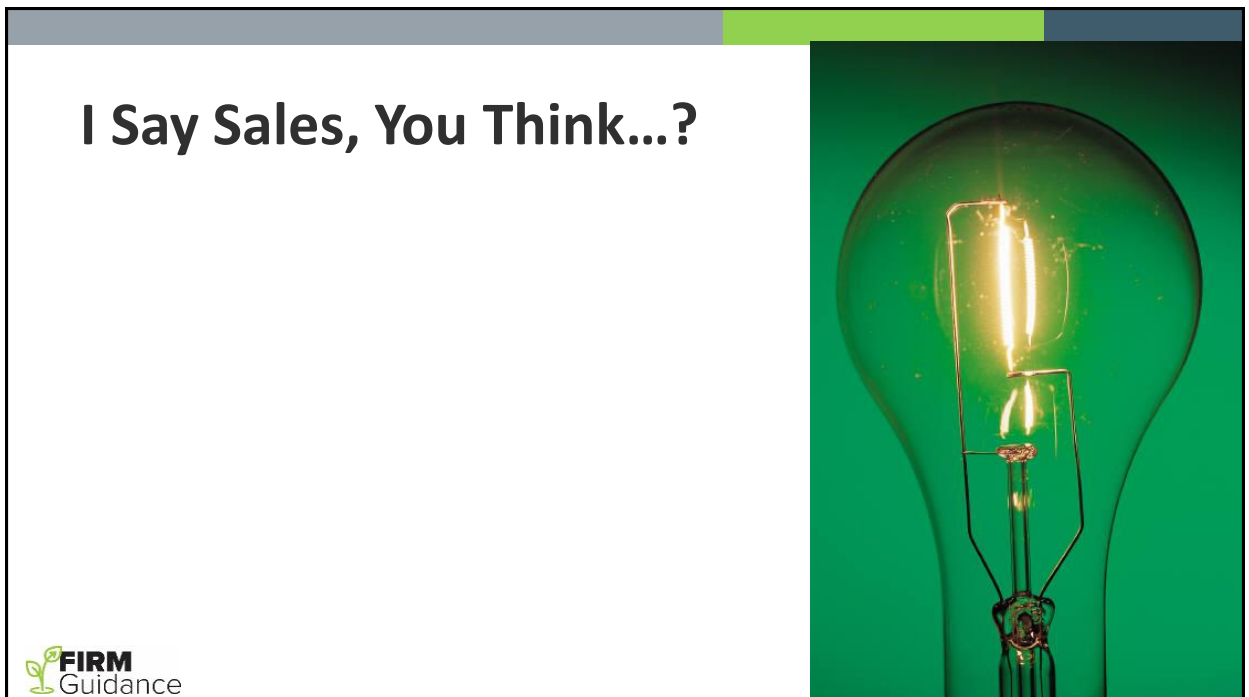
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Sales Defined

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



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Stages of Personal Selling



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Top 5 Keys to Success

- Attitude
- Invest time wisely - lose fast
- Passionate
- Overcomes obstacles
- Likeable - authentic



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Selling - Inside & Out

- You must connect personally
- Inside
 - Referral sources
 - Teams
 - Cross selling
- Out
 - Clients
 - Prospects
 - Referral Sources



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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”)

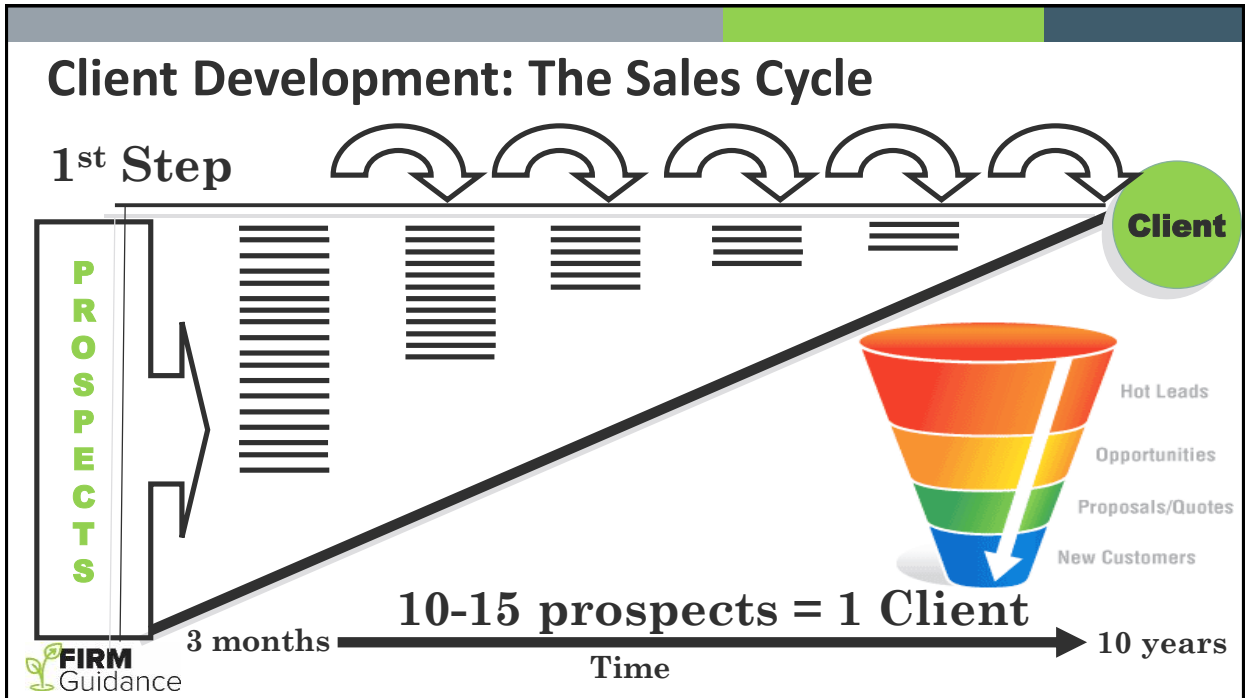


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The Client Life Cycle



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Making - and Managing - Time

- Engage in effective activities – try to find those that cost only time
- Manage contacts
- Select targets
- Assess & qualify
- Forge, maintain and grow relationships

FIRM
Guidance

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Get Organized (or Reorganized)

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



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Categorize Targets

- Clients
- Family/friends
- Prospects
- Referral sources
- Hubs and connectors
- Allies and Others



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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%)



ACC Study

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Five Steps to a Referral



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Identify Opportunities with Good Qs

- What work are you currently doing? What work are other firms doing for them?
- What are the trends/issues impacting their industries?
- What are your clients' future plans?
- Are your clients aware of all the firm's capabilities?
- What are the career aspirations of your contacts?
- Are there seminars or CLE programs you could deliver to your clients?



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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!
- DO IT!



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Elevator Speech Workshop



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“Hello”



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WHO ARE YOU?



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How do you answer this question?



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Catherine Alman MacDonagh, JD
857.272.6896
Catherine.FirmGuidance@gmail.com
FirmGuidance.com

ELEVATOR SPEECH WORKSHEET

What it is

- 20-30 seconds
- A succinct soundbite
- Memorable
- Spotlights something unique about you
- Focused on what you offer and the benefits of working with you
- Delivered effortlessly and naturally

Guidelines

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

Rules

- Must have a hook - something that inspires people to want to learn more about you
- Tell your listener why you are interested in them
- Must pass the "so what?" test
- Make it powerful and focused on what you can do for others
- Write
- No: "I'm a partner/counsel/associate"
- No: sales pitch
- No: legalese
- Generic for all purpose, specific for events / opportunities
- Try this: my name is _____ and I help _____
- Feature, verb/action, benefit

What are your deliverables? Identify services or features:

Write a list of benefits your clients derive from working with you (make sure they pass the "so what?" test):

Combine the deliverables with the benefits to write your 15-25 second elevator pitch. PRACTICE IT until you can say it effortlessly.

"So, what do you do?"

- 20-30 seconds
- A succinct soundbite
- Memorable
- Spotlights something unique about you
- Focused on what you offer and the benefits of working with you
- Delivered effortlessly and naturally

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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 an extreme skiing photographer . . . on the weekends. And a tax attorney helping my clients navigate the code on the other days of the week."



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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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The Rules

It must pass the “so what?” test.

Try not leading with “I’m a lawyer.”

No sales pitch.

No legal-ease!



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Guidelines

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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 introduce yourself to the group!



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Contact



Catherine Alman MacDonagh, JD

FIRM Guidance

www.FirmGuidance.com

Legal Mocktail/The Mocktail

CEO and Co-Founder

www.LegalMocktail.com

Legal SASI

Sustainability and Social Impact

www.LegalSASI.com

Legal Lean Sigma Institute

CEO and Co-Founder

www.LegalLeanSigma.com

Legal Sales and Service Organization

Co-Founder

www.LegalSales.org

