BDWise Program

For Leading Law Firms Who Want to Implement a Proven Business Development Program

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This document explains the details of the BDWise business development program. It includes a list of lessons and the ways in which it can be delivered.

REVENUE WISE

THE SMART WAY TO GROW

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Representative Clients

Davis Polk

CLEARY GOTTLIEB

GIBSON DUNN

Skadden

Morgan Lewis

orrick

Locke Lord LLP

KING & SPALDING

Seyfarth

DLA PIPER

FENWICK & WEST

Akin℠

Holland & Hart

KILPATRICK TOWNSEND

BAKER BOTTS

Representative Attorney Results

Patent Litigator
AMLAW 10 firm

Began coaching him as a mid-level partner. He was already doing well, so our job was to take his practice to the next level. We focused his business development efforts on large national clients. **He is now the chair of the department and has a $15 million dollar book.**

M&A/Corporate Attorney
Partner, AMLAW 60 Firm

Began coaching him when he arrived as a lateral, non-equity partner, with no book. Within two years, he developed an entirely new practice group, **closed $2.5 million in originations, and was made equity partner**.

Class Action Litigator
Partner, AMLAW 20 firm

Began coaching her when she was a junior partner. She had no book of business and no practice focus. Assisted her in building a **$5 million book in three years**. **Currently, she is a nationally known class litigator with a $22 million book.**

M&A/Energy Attorney
Department Chair
AMLAW 100 firm

Began coaching him when he was a senior associate. Helped him focus his practice and taught him the essential BD skills. **He is now a nationally known energy deal lawyer, has the largest book at the firm, and is the department chair.**

IP Litigator
Managing Partner
AMLAW 100 Firm

Began coaching him when he was a junior partner. He was struggling to make his hours and needed a practice focus. He reached **$5 million in five years** and has a clear focus on trade secrets and other IP litigation. **He has steadily progressed through the firm and is now the Managing Partner.**

Real Estate Attorney
AMLAW 200 Firm

Began coaching her as a mid-level partner. She had solid success, but the market soured, and her key clients faltered. We repositioned her as a development and finance lawyer. This turned her practice around, and **within three years, she was back to $4 million a year.**

Program Overview

Process Stages

Define

We begin by defining what makes you better and thus different from your competitors (Recognized Expert Position). We translate your REP into a strong LinkedIn profile and firm bio.

Attract

We develop a go-to-market plan that generates new contacts and brand recognition. We teach you how to use a "Signature Talk" to land new work and how to monetize LinkedIn.

Nurture

We gather all your best contacts into a sales pipeline and teach you how to nurture your contacts in a "value-added way" until a need arises.

Convert

You will learn our proprietary sales and pitch process that will help you convert your contacts' needs into new clients and matters.

Delight

Being a great lawyer and delivering outstanding client service drives referrals. We teach you how to create "bulletproof" clients and generate referrals.

Scale

To truly succeed, you have to scale your practice and develop a "dream team." We teach you how.

BDWise Program Model

All successful business developers deliver "superior value" throughout the biz dev cycle. During each stage of the process, you will complete specific deliverables and learn proven skills.

Develop Expertise, Skills & Habits

How the Program Can Be Delivered

These are our three standard program formats. We can also customize the program and curriculum to your specific needs.

Webinar and Online Learning

- The program is delivered over eight months, with one lesson a month.
- There are eight lessons. Each month, they will learn an essential skill or complete a core deliverable (e.g., Learn to sell or develop a Go-To-Market Plan).
- Lessons are delivered via live, 90-minute webinars. One webinar is 2 hours.
- Each webinar is recorded for later viewing and is stored in our online Learning Management System (LMS).
- The LMS contains the forms, lesson-specific workbooks, and recorded webinars.
- Your firm will have its own private course on our LMS. Each user will have a login.

One-On-One Coaching

- The program is delivered over ten months.
- Each participant completes three assessments to measure personality traits, communication preferences, outward behavior, and internal motivation.
- In our initial 90-minute meeting, we debrief the assessments and set goals for the program,
- There are thirteen 60-minute coaching sessions.
- We have over a dozen lessons. Every lesson has a full complement of materials. We cover some lessons with everyone (e.g., how to sell). The rest are taught on an as-needed basis.
- A big part of our work will be advising you on how to land your best and highest-value clients. We teach you a repeatable process for profiling, strategizing, and conducting important sales and pitch meetings.

Group Coaching Program (iGroups)

- There are six attorneys per group, segmented by seniority.
- We cover the same material as the full training class.
- The program is eight months long. The same duration as the training class.
- There is one session a month, for a total of eight sessions.
- Each session is 90 minutes.
- iGroups are a confidential place to share wins and challenges, receive personalized coaching and feedback, and learn from peers who are having similar challenges.

List of Program Lessons

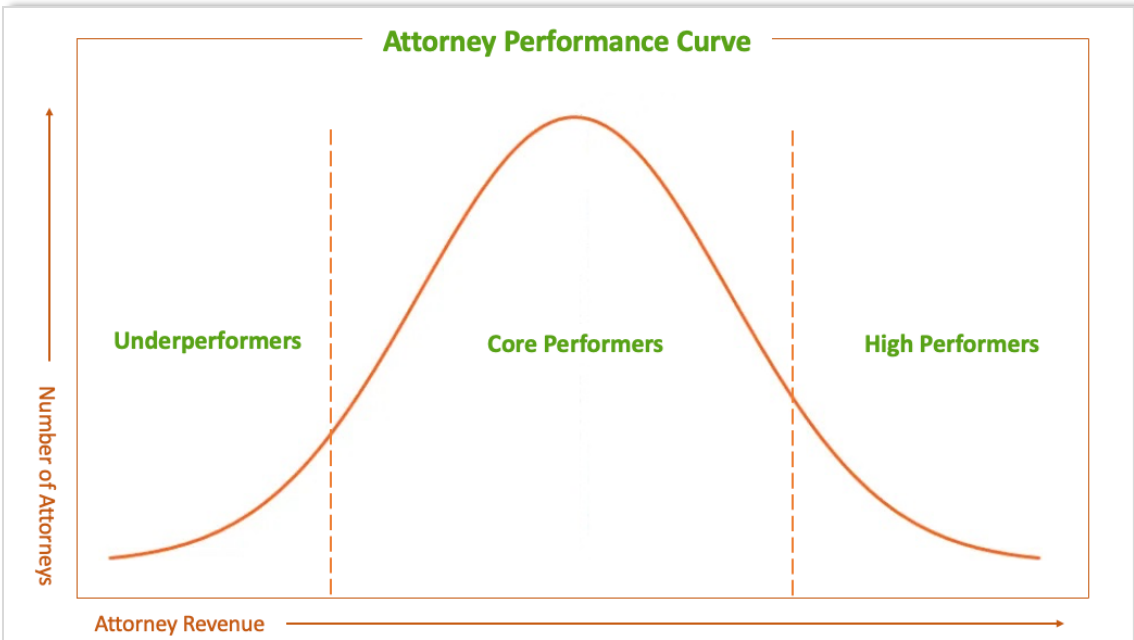
LESSON	DESCRIPTION
	Develop Recognized Expert Position
Need Addressed	This lesson will help you develop a Recognized Expert Position and become the "go-to" attorney in your desired area. You will leave this lesson having defined your optimal focus, the "Core value" you provide clients, and what separates you from the competition.
Deliverable	Complete the Recognized Expert worksheet.
	Build a Sales Pipeline and Powerful Network
Need Addressed	This lesson will help you build your network and develop your "Top 25" list of best contacts. You will leave with a tracking tool that you can use to manage and follow up on your contacts.
Deliverable	Build a list of your Top 25 contacts and a plan for building your network.
	Learn an Effective Consultative Sales Process
Need Addressed	This lesson will teach one of the most essential skills in business development: how to convert your prospects into clients during sales/pitch meetings. The Acquire process is the only sales methodology designed exclusively for attorneys. It is a consultative and non-salesy approach that clients appreciate.
Deliverable	Learn the Acquire sales process.
	Learn how to Cultivate Your Contacts
Need Addressed	This lesson will teach you how to qualify your contacts throughout the entire cultivation cycle, from meeting suspects through your initial business-focused meeting. You will learn techniques for cultivating your contacts, building relationships, conducting client development meetings, writing intro emails, and developing "meeting maps."
Deliverable	Develop your qualifying criteria and how to customize a meeting map.
	Write an Effective LinkedIn Profile & Learn to Monetize LinkedIn
Need Addressed	In this lesson, you will learn how to write the optimal LinkedIn profile that has been optimized to increase your Google and LinkedIn search rankings. You will also learn how to monetize LinkedIn by generating "warm" introductions to potential clients and raising your visibility on the platform.
Deliverable	Write your LinkedIn profile. Learn how to generate clients and build your brand.

LESSON	DESCRIPTION
	Develop a Verbal Business Card
Need Addressed	In this lesson, you will learn the optimal way to answer the question, "What do you do? This way generates interest in the listener and allows you to elegantly transition the conversation to possibly working together.
Deliverable	Develop and practice a Verbal Business Card
	How to Attend Conferences and Work a Room
Need Addressed	In this lesson, you will learn how to attend conferences and networking events to maximize the possibility of generating new clients. You will also learn how to "work a room" in a way that feels natural and not "salesy."
Deliverable	Develop an event strategy and learn how to work a room and convert strangers to contacts.
	Develop an Evergreen Business Development Plan
Need Addressed	This is a two-part lesson. In the first part, you will forecast the revenue "Number" you want to hit for the period. It includes both your originations and proliferations. This tool allows you to establish and track other key BD metrics and record your results. In the second part, you will complete the Evergreen biz dev plan. This is <u>not</u> your typical BD plan. You will develop a realistic, easy-to-follow plan that will help you hit your Number.
Deliverable	Complete Originations Forecaster and Evergreen BD plan.
	How to Effectively Cross-Sell
Need Addressed	Expanding existing clients is essential to the long-term success of the firm. In this class, you will learn a proven cross-selling methodology that clients appreciate, delivers real revenue growth, and overcomes the problems that plague these types of initiatives. It is designed to help both individual attorneys and practice groups improve their cross-selling ability and success rate.
Deliverable	Develop your cross-selling plan and complete the template.

LESSON	DESCRIPTION
	Learn How to Cultivate Contacts and Conduct Client Development Meetings
Need Addressed	The longest part of the sales cycle is nurturing your best contacts until they need your services. It can take months and sometimes years to land a top client. This class teaches you how to cultivate contacts, build relationships, and conduct client development meetings. You will learn how to develop your own "meeting maps," "bait" (useful content), and intro emails.
Deliverable	Complete your Meeting Map.
	Use Signature Content to Generate Clients
Need Addressed	The Signature Content toolkit consists of three components. An Insights Paper, a Signature Talk, and a Scored Worksheet. These thought leadership elements are excellent tools to secure initial client meetings, build visibility and credibility, and generate new leads from conferences and speaking engagements. Depending on their practice and needs, they can develop one or all of these tools for marketing. This lesson provides step-by-step instructions, premade templates, and forms to guide their efforts.
Deliverable	Develop your Insights Paper and/or Signature Talk
	Develop an Evergreen Business Development Plan
Need Addressed	This is a two-part lesson. In the first part, you will forecast the revenue "Number" you want to hit for the period. It includes both your originations and proliferations. This tool allows you to establish and track other key BD metrics and record your results. In the second part, you will complete the Evergreen biz dev plan. This is <u>not</u> your typical BD plan. You will develop a realistic, easy-to-follow plan that will help you hit your Number.
Deliverable	Complete Originations Forecaster and Evergreen BD plan.

Coaching for Performance

A typical law firm has a clear majority of "core" performers, a small but elite group of Stars, and a group whose performance trails. It's possible to boost performance throughout the curve by aligning the right type of business development coaching with each level of performer.



Overview of the Model

This model only applies to the attorneys in your firm who are expected to do ongoing business development, and it only tracks the revenue attributed to each attorney.

If you analyze the performance data of all your attorneys, you can determine the exact percentage and number of attorneys that fall into each category. In my experience, the percentage in each category is roughly:

- Top performers: 10% - 20%
- Core performers: 60% - 70%
- Underperformers: 10% - 20%

Successful Approach

One of the reasons the Revenue Wise approach succeeds so often is we match the type of coaching each level of performer receives.

David Adams Bio and Qualifications

Senior Advisor, Coach & Trainer

David Adams is a seasoned coach, author, speaker, and retreat facilitator. He brings over 20 years of experience to his role of helping lawyers and leaders improve their business development, leadership, and communication skills.

David is an expert in helping lawyers, working individually and in practice groups, develop the necessary attitudes, behaviors, and capabilities to succeed. He is regularly called upon to help practice groups and firms develop innovative ways of competing and achieving market dominance.

Experience

As the founder of Revenue Wise, a business development & leadership firm for lawyers, David has worked with hundreds of lawyers at such firms as Davis Polk, Skadden, Cleary Gottlieb, Gibson Dunn, King & Spaulding, Morgan Lewis, Orrick, Herrington & Sutcliffe, Seyfarth Shaw, Cadwalader, Fenwick & West, Latham & Watkins, Locke Lord, Kilpatrick Townsend & Stockton, Littler Mendelson, Polsinelli, Holland & Hart, Keker & Van Nest; and many others.

In his roles as a coach, consultant, and trainer, David is sharply focused on producing measurable results and helping lawyers overcome internal and external obstacles to achieving business development success. Many firms have standardized on the Revenue Wise approach to business development.

David works with practice groups to refocus their efforts, reposition them in the marketplace, formulate effective plans, overcome personality conflicts among leaders and members, and create methods of accountability that help them achieve their objectives.

David also works with firm management and its leaders to develop effective growth strategies and plans, implement cross-selling programs, develop the next generation of leaders, help the management committee work more effectively together and resolve issues amongst the partnership, and facilitate effective retreats and meetings.

Speaking & Training Experience

David has been speaking in front of audiences throughout his career. His speaking engagements fall into three categories: talking at law firm retreats, leading in-depth, experiential training programs, and speaking at industry conferences and associations. His talks and trainings are highly practical, engaging, insightful, and immediately useful.

Education

David holds a Master's in Neurolinguistics and is a Certified Professional Behavioral Analyst. He obtained his Certified Professional Co-Active Coach (CPCC) credential from the highly regarded Coaches Training Institute and is a graduate of the institute's Co-Active Leadership Program, a leader in executive development. He is also certified in the Myers-Briggs Type Indicator, IEQ Leadership assessment, Daniel Goleman's emotional intelligence model, and the corresponding 360-degree assessment.