

BUSINESS DEVELOPMENT TRAINING GRID

	TRAINING GOALS TARGET AUDIENCE	TRAINING SETTINGS AND IDEAS		
PRODUCT KNOWLEDGE		RETREATS, OFFSITE MEETINGS AND "IMMERSION TRAINING"	BROWN BAG SEMINARS & WEBINARS CLASSROOM TRAINING	INDIVIDUAL COACHING, DIY AND ELEARNING
FIRM FACTS, MARKET POSITION, STRATEGIC DIRECTION	Better understanding of firm market position and strategic plan. All personnel.	Conduct a "quiz show" using questions about firm history, clients and capabilities. Great way to introduce new laterals as well.	Lead a "guided tour" of firm web site and latest collateral. Use wireless polling technology to test knowledge of firm facts.	Post daily questions of fact about the firm on the Intranet. Track responses and reward.
CLIENT PORTFOLIO, INDUSTRY LEADERSHIP, CLIENT TRENDS	Familiarity with key clients and growth industries for the firm. All lawyers, staff leaders.	Invite key clients to speak at group retreats (live or via Skype). Ask clients to talk about how they serve their own clients.	Presentations (live or recorded) by clients. Ask relationship partner to talk about a key client over lunch. Record and distribute to all offices.	Record parts of client presentations and share over the Intranet.
INDIVIDUAL AND GROUP EXPERTISE	Deeper familiarity with individual and practice group expertise, strategy and targets. All lawyers, support staff.	Share practice group and individual successes. Conduct "speed dating" exercises within and among practice groups.	Highlight selected practices, individuals, cases and transactions as part of regular agenda at practice and industry group meetings. Valuable presentation training for associates.	Regularly highlight selected new clients and matters on Intranet. Offer coaching to "rising stars."

BD AND MARKETING RESOURCES	Awareness of how to access in-house marketing and BD resources. All personnel.	Deliver regular department presentations to firm leadership. Interview leaders at retreats to uncover areas for improvement.	Develop a department "road show" and schedule regular presentations at office and practice group meetings. Highlight innovation and successes.	Create "video tour" of department; introduce new BD staff. Post testimonials on Intranet.
INTERPERSONAL SKILLS				
COMMUNICATION STYLES	Improved communication through awareness and practice using styles. All personnel.	Participants complete communications questionnaire prior to meeting. Follow-up activities improve recognition of communication styles and preferences.	Create innovative lunchtime presentation (video of different communication styles); include group activities to learn how to work with different styles and preferences – live and via telephone.	Create short video modules, posted on the Intranet, that reinforce the importance of non-verbal communication.
LISTENING TECHNIQUES	Effective listening skills with clients and colleagues. All personnel.	Demonstrate active listening techniques and secretly incorporate "listening games" into other activities.	Develop presentations that expose individual biases that influence how we perceive – visual, kinesthetic and auditory.	Create video modules that help lawyers/staff "listen with their eyes."
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PRESENTATIONS TRAINING	Improved presentation and leadership skills. All lawyers, staff leaders.	Offer individual and small group presentation training before/after group and firm retreats. Focus on client pitches.	Offer training on "how to run a group meeting," including how to debrief a group exercise.	One-on-one training prep for presentations (CLEs, proposals).
SALES AND PROPOSALS SKILLS	Improved competitive intelligence, targeting and sales skills. All lawyers.	Integrate case studies and role play exercises (some with clients – live or video) at group retreats.	Schedule brown bag series on a variety of topics (i.e., CI, proposal support, sales meetings, and targeting).	Record brown bag series and post on Intranet.

REPUTATION AND NETWORKING SKILLS				
PRACTICE NICHE	Clearly-defined individual and group expertise. All lawyers.	Conduct “elevator speech” exercises at group retreats. Couple with presentations on unique, new and/or successful practices.	In-person seminars with junior partners, senior associates.	Feature selected niches on Intranet. Individual coaching.
NETWORKING	Stronger networks; improved networking skills. All lawyers and staff.	Group exercises at retreats, including speed dating and “Working a Room.”	Offer specific class on targeting, networking skills and CRM.	Post CRM “best practices” videos and elearning modules on Intranet.
SOCIAL MEDIA	Expanded, effective use of social media as a BD strategy. All Lawyers.	Create a social media “expo” where lawyers get help with social media tools – LinkedIn, Twitter, and Facebook.	Create a social media “expo” where lawyers get help with social media tools – LinkedIn, Facebook and Twitter.	Develop one-on-one and elearning toolkits on better use of social media.
CLIENT SERVICE				
CLIENT SERVICE FUNDAMENTALS	Firmwide client service strategy adaptable to specific client needs. All personnel.	Conduct role play exercises on client service topics (fee disputes, personality clashes, “value adds”). Develop client service guarantees.	Schedule lunchtime seminars on specific client service topics. Include case studies and success stories. Great staff training topics.	Video segments of clients sharing how they serve their clients. Daily quiz on Intranet.
CLIENT SERVICE INTERVIEWS	Increased number and quality of CSIs; follow-up. All lawyers.	Conduct client service interview at firm retreat with single client or client panel. Consider Wicker Park Group to demonstrate.	Conduct client service interviews with local client or client panel. Include client paralegals and assistants on panel.	Create CSI process and script video on Intranet. Offer individual prep support/coaching.
CLIENT TEAMS	Targeted, successful client teams program. Lawyers and staff.	Team retreats to set goals, strategies, and responsibilities. Team leader training at retreat.	Lunchtime training for team leaders, members and support.	Post team success stories and ideas on Intranet. Coaching.