



Nailing the Fundamentals: The Value of Rehearsing

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While in NY recently, I found myself outside Carnegie Hall. Whenever I find myself there, I often think of the old joke attributed to Jack Benny that goes “How do I get to Carnegie Hall?” To which Jack replied “practice, practice, practice.”

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It’s an oldie but goodie as far as jokes go. It is also a good reminder of the value of rehearsing if you want to succeed on the big stage. Jack made his performances seem effortless. This betrayed the fact that he rehearsed regularly to make sure his performance flowed and was memorable.

As business developers, we frequently encourage lawyers to practice before a large pitch or client meeting, but it can be hard with all the competing demands on a lawyer’s time. The practice session and a pitch team’s initial meeting together often happens in the cab ride over to the client or in the lobby of their building. However, practicing and refining a message can be the difference between winning and losing. It is often in rehearsals that a team’s chemistry, so vital to a client’s impression of who they will hire, is formed. It is also through this process that a team can refine its message to be crisp, on-point and effective.

To help encourage rehearsing, it can be helpful to have a simple checklist in mind to help the process be efficient. Following are a few basic ideas I keep in mind when working with a team before a presentation. This is by no means an exhaustive list and depending on the presentation, you will want to tailor your approach and add or eliminate points that meets your team’s need.

1. **Know your client.** What is their objective for the meeting? Who will be in attendance? What will their roles be? What is their decision making criteria? Who is the decision maker vs. influencers. Align your team with the client’s based on relationships, subject matter and roles on the team. Try and develop multiple lines of dialogue that demonstrate the strengths and the benefits of the adjacencies that your team brings.
2. **Know your competition.** What are their strengths? Weaknesses to exploit? Determine how your team differentiates itself.
3. **Develop a strategy to win.** This should include a strong value proposition that clearly and crisply demonstrates why your team and its experience should be the team of choice. Engage the client and your internal coaches throughout the process. Seek feedback and insight. Offer ideas and strategies to their issue that demonstrates your commitment to their success. Test your messaging and understanding with the client before the meeting to make sure you are meeting their needs.
4. **Bring the “A” team** (i.e. those lawyers that will actually be doing the work). Consider carefully the make-up of your team in terms of gender, diversity, subject matter expertise and chemistry. Don’t outnumber the client. Anticipate questions the client will have and formulate appropriate responses that can be given.
5. **Avoid death by PowerPoint.** Focus instead on the discussion and interaction of your team with the client. Consider a single-page placemat approach to guide the meeting. Team members may want to “own” a single issue or two that demonstrate their mastery of that subject. Though discussion try to co-developing a solution to the issue with the client. This process alone may win you the work as the client is invested in your approach and helping define the way forward.
6. **Have an actionable next step or series of next steps at the conclusion of the meeting.** Be clear on who is the point-person on your team for which issue with timing, ongoing discussions

and to-dos clearly expressed.

7. Develop a one-pager team roster with photos and contact info to leave with the client.

8. Follow-up, follow-up, follow-up

Helping busy attorneys perform at their best and win new business is how business development professionals demonstrate the value they bring to a firm. If the process is well organized, efficient and valuable, attorneys will be more likely to want to rehearse the next time they are trying to influence a client and win a new piece of business.
