

## Mastermind 4 – Participant Spotlight Summaries

### Lindsay Vest – Using AI in Business Development

**Key theme:** Leveraging AI to empower attorneys, enhance efficiency, and strengthen relationships.

Attorneys face mounting demands—billable hours, client generation, and cross-selling—so AI can free time for true relationship-building.

#### Four main AI applications:

1. Understanding clients: Use internal or off-the-shelf AI tools to analyze data, spot trends, and identify client priorities.
2. Generating thought leadership: Encourage attorneys to personalize and share firm content; use AI to overcome “blank-page fear” and craft outreach (emails, LinkedIn posts).
3. Showcasing the firm’s AI expertise: Clients want firms that are tech-forward and collaborative; highlighting firm-wide AI adoption strengthens credibility and trust.
4. Enhancing personal brand: Use AI to improve web bios, tailor posts, and help attorneys present themselves authentically and strategically online.

**Takeaway:** AI should be viewed not only as a technical tool but as a business-development ally to help lawyers understand, engage, and connect with clients more effectively.

### Ralph Cooper – Successful Lateral Integration

**Key theme:** Business development’s critical role in onboarding and integrating lateral attorneys.

#### Success Factors:

1. Early support: The first year is pivotal—BD should ensure laterals feel fully supported from day one.
2. Relationship mapping: Identify and connect laterals’ unique capabilities with existing firm relationships to uncover cross-practice opportunities.
3. Tailored materials: Customize pitch and integration materials to each lateral’s clients and expertise—avoid one-size-fits-all approaches.
4. Collaboration across departments: Example—linking real estate and litigation attorneys to pursue shared opportunities and conference participation.
5. Accountability and follow-through: Maintain regular check-ins (monthly or quarterly) to track progress, sustain engagement, and build trust over time.

**Takeaway:** A thoughtful, personalized integration process helps laterals transfer relationships, build new ones, and see BD as a lasting partner in their success.

## **Susan Slifer – Maintaining Momentum**

**Key theme:** Sustaining energy and focus throughout and beyond a BD training or coaching program.

Early excitement can fade under workload and information overload. Overwhelm, not disinterest, is the true enemy of momentum.

### **Success Factors:**

- Focus on process: Simplify the approach—focus on “do a little more, do a little better.”
- Coaching framework:
  1. Past: Debrief previous actions, celebrate wins, troubleshoot barriers.
  2. Present: Discuss current priorities to surface relevant ideas and connections.
  3. Future: Set three small, realistic, high-impact actions for the next two weeks and schedule the next meeting.
- Core insight: Consistency and simplicity sustain progress better than trying to do everything.

**Takeaway:** Momentum in business development grows from achievable, continuous, right-sized actions.