

Office Hours October 1, 2025

Informal check-in for participants using the Lawyer BookBuilder/Mastermind materials to share wins, troubleshoot coaching challenges with attorneys, and trade practical tactics.

Key Themes & Practical Takeaways

- **Reminder that Mastermind participants can access shared resources:** A central landing page houses takeaways, prompts, and recordings for easy reference.
 - <https://lawyerbookbuilder.com/lawyer-bookbuilder-rainmaker-mastermind/>
- **Engagement with Lawyer BookBuilder modules:** Participants like the videos/worksheets; some attorneys don't have the time to watch modules so some participants summarized the modules and explained them to their lawyers.
- **Prioritization - focus over shotgun BD:** Some lawyers want to do "everything", group repeated advice to narrow initiatives, extolled the importance of breaking goals into bite-size actions. Start with one client/initiative ("low-hanging fruit"), then expand.
- **Time constraints and calendar discipline:** Peak billable periods and conference season take up the lawyers' time —block out 30 - 60 minute calendar time with them for BD.
- **Create opportunities:** Don't let lawyers wait for reasons to reach out—manufacture them; small "homework" with specific module sections works.
- **Cross-selling framing:** Show up with a "gift" (useful audit, presentation, insight) so colleagues can introduce you without feeling salesy; activate reciprocity by first giving opportunities to others.
- **Succession & cross-selling:** Pair younger partners with relationship owners; invite them to client feedback sessions; carve out a niche inside a key client.
- **Optimizing Conferences:** Pre-set KPIs (pre-event outreach, meetings booked, quality follow-ups) and discussed ways speakers can engage with audience members after their talk to try to build relationships (e.g., lead with questions to get them talking).
- **Internal PR:** Practice-group newsletters and partner-meeting "client success" stories have dual benefits of sharing the win and reminding that the firm values certain behaviors.
- **Gamification & incentives:** Offer low-cost prizes, internal awards and recognition, tickets tied to bringing a client/peer, support associate-run events, and "Client Service Super Bowl" point systems; associate-marketing committees funded to host peer events.
- **Branding & bio work:** Distinguishing junior-associate bios is a challenge; discussed importance of internal/external branding for rising attorneys.

- **Tech nudges:** Interest in CRM/AI prompts (e.g., Copilot) to surface dormant clients and overdue touchpoints; there is a desire for technology that “talks to each other.”, also a need for technology that automatically reminds lawyers to act on their BD opportunities.

Wins/Stories

- Coffee with a deputy GC turned into a 90-minute meeting and work—proof that creating your own opportunities pays off.
- Serendipitous panel connection led an attorney to re-engage an old contact.

Summary of Suggested Action Items

- Coaches: schedule recurring 30–60 minute BD blocks with each attorney; use worksheets live on screen; help lawyers prioritize their efforts.
- Before conferences: identify 3–5 targets, pre-book meals/meetings, and define follow-up standards.
- Start/expand internal recognition: add a “client moment” to practice/partner meetings; circulate short win caselets.
- Pilot a micro-gamification sprint (2–4 weeks): small self-reported BD actions → recognition/swag.
- Build a “gift menu” lawyers can offer in cross-sell settings (audits, trainings, playbooks).
- Explore tech prompts (report of dormant contacts; Copilot/CRM queries, reminder to take targeted BD actions) to automate nudge lists.

And ...

And example of a recognition award we saw on LinkedIn today:

