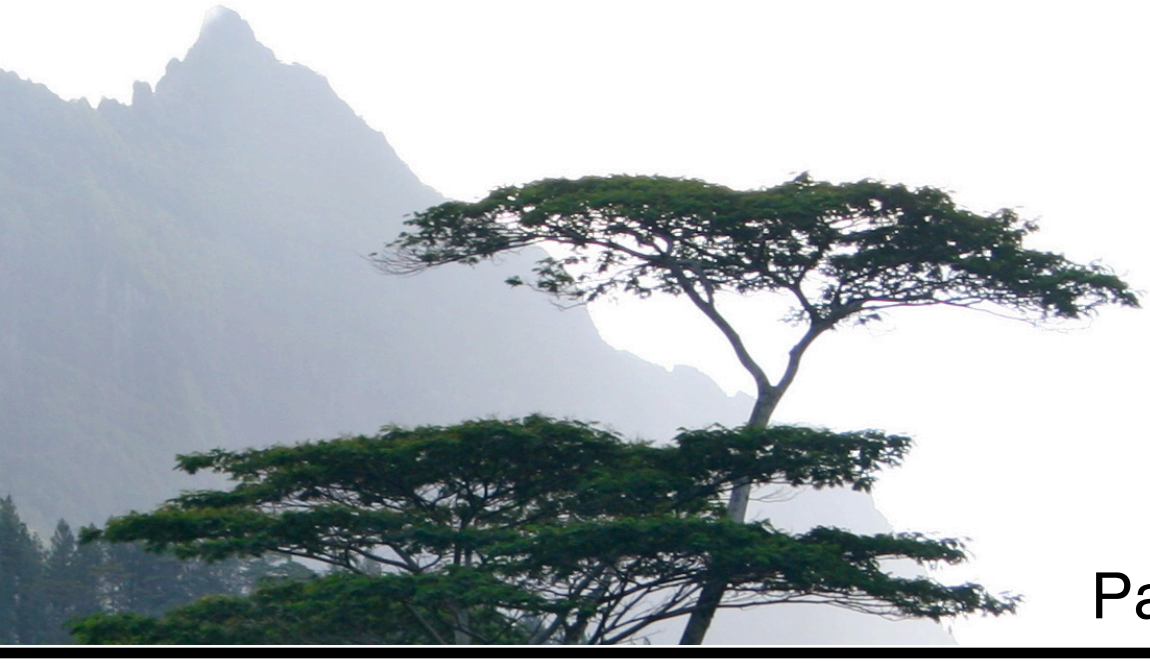
CORDELL PARVIN LLC

Client Development Series



Participant Guide

Securing, Retaining and Expanding Relationships with Your Clients

Letter from Cordell

I am delighted that you have decided to participate in our Securing, Retaining and Expanding Relationships program. The six-module video was recorded live at a training event in our Dallas conference center. I recorded this program and created the detailed participant guide to enable every highly motivated lawyer the opportunity to develop business using the approaches that worked for me and work for the many lawyers I coach.

The information you will learn in the videos is the most current available and critical to effective client development. Because the video was shot from a live program, to make it easy to use with the participant's guide, I've done the following:

1. Included in the participant guide critical slides, questions, planning templates and other information from the video to make note taking and learning easier and more effective for you.

2. Provided responses of the attorneys who participated in the recorded sessions. I've done this because at times it may be difficult to hear these participant responses. Of course, what is most important is your response to the questions.

3. Included recorded instructions from my friend and colleague, Dr. Cindy Pladziewicz, before and after each module so it's easy to follow from module to module.

I look forward to hearing from you regarding your experience with the program. Cindy and I are happy to take your questions as you go through the modules.

Instructions for this Program

This program consists of 3 hours of video and a minimum of 2 hours of exercises contained in this Participants Guide.

To access the video go to http://www.cordellparvin.com/multimedia/video.html

This video program can be completed in one session, however to get the most benefit it is best completed over time with sufficient time devoted to work through the exercises.

About Cordell Parvin

Cordell Parvin practiced law for more than 36 years. He was a Practice Group Leader and developed a highly successful national construction law practice. During his career, Cordell taught, mentored and coached young lawyers on their careers, professionalism, client management, and work-life balance.

At Jenkens & Gilchrist, PC, Cordell initiated and directed the firm's Attorney Development Program. He created a comprehensive program for associate development focused on skill development, mentoring, shadowing and career planning. Cordell motivated the leadership of his firm to get behind the associate development program and to focus attention on the importance of career planning.

He has a passion for teaching and coaching young lawyers. He recognizes that each lawyer has unique skills, talents and dreams. He works with lawyers as individuals and seeks to inspire and energize them based on their individual career and life dreams.

About Cynthia Pladziewicz

Dr. Cindy Pladziewicz is a licensed psychologist, attorney and Professional Certified Coach (PCC). Her professional experience includes practicing as a Partner, and serving as Chief Development Officer, with the law firm of Thompson & Knight LLP, ten years in private practice as a psychologist at Baylor University Medical Center in Dallas, and service on the board of a publically traded corporation. As an adjunct professor, she taught and developed courses in law and psychology at Southern Methodist University.

She frequently speaks and writes about lawyer leadership, coaching and career development. Her work has been featured in the American Lawyer, Law Firm, Inc., the ABA Journal online, the Dallas Morning News, the Dallas Business Journal (2009 Changemaker Award), Metro Newspapers and D Magazine. Cindy holds a BBA in Accounting with special distinction from the University of Oklahoma, a J.D. with honors from Southern Methodist University Dedman School of Law and a Ph.D. in Clinical Psychology from the University of Texas Southwestern Medical Center at Dallas.

Contents

Module 1 Training Overview and Introduction to Client Development

Module 2 Build Your Plan / Planning

Module 3 Build Your Plan / Goal Setting

Module 4 Build Your Profile / Writing

Module 5 Build Your Profile / Speaking

Module 6 Build Client Relations / Communicating

Program Goals and Objectives

Goals

During this program you will learn what, why, and how to change your client development efforts to achieve greater success and more enjoyment in your law practice and daily life.

This program will:

- Help you build the foundation to make client development a part of your regular routine;
- Furnish practical examples of client development activities that work;
- Stimulate ideas on how to develop valuable relationships with your clients; and
- Empower you to take the client development actions that will achieve your goals.

By the end of the program you will:

- Define your target market and referral sources to broaden opportunities;
- Initiate a client development plan with goals and begun to take actions and be accountable;
- Create a 90 day action plan;
- Review, update and enhance your bio;
- Identify trade, industry or client organizations for which you will become the “go-to” person by writing, speaking, and listening; and
- Discover your learning style and personality type and those of your clients.

How to Maximize Your Experience

- Participate by giving ample time for completion of all exercises;
- Determine that client development activities will become a habit; and
- Pick a learning partner to go through the program with you.

Module 1 Introduction to Client Development

(Follow along as you watch the video)

Four Eras of Client Development

1. Do Good Work
2. Unsolicited Contact
3. Websites / Branding
4. Being Remarkable, Extraordinary, Memorable

Module 1 Exercise

Client Development Self-Assessment – Where Are You Now?

1. On a scale of 1-10 rate where you are right now in your client development efforts using the scale below.

1-3 Totally Lost	4-7 Midpoint 50/50	8-10 Totally "Get It"
Don't have any clue where to start or what to do	Have some idea of what to do, but need to improve	Have a game plan and am implementing it with great success

My Self-Assessment is _____

2. What are your origination numbers (or whatever numbers your firm uses for tracking)?

   a. What percentage of that number did you bring in yourself and how much is shared?

   b. Where would you like to be in 1 year?

   c. Where would you like to be in 5 years?

3. List your client development activities below. For each activity please rate on a scale of 1-10 your subjective rating of the success of the activity over the past 12 months. An activity is "successful" if it takes you closer to your client development goals; for example obtaining new clients, expanding relationships and work obtained from existing clients, obtaining referrals or pitch opportunities, and/or increasing your visibility and credibility with your target market. Finally note any adjustments you can make to improve the efficiency or effectiveness of the activity.

Client Development Activity	Rate Success (1-10)	What adjustments can you make?

4. Have you obtained any new clients in the last year?

   a. How did you obtain those clients?

5. Have you expanded relationships with any clients over the last year?

   a. What did you do that enabled you to expand relationships with those clients?

		Yes	No
6.	Do you have a written plan for this year?		
7.	Do you have written goals for what you want to achieve this year?		
8.	Do you plan each and every week what your client development activities are going to be?		
9,	Do you have a system to stay in contact with your contacts?		
10.	Do you regularly visit your clients at their office without charging them?		
11.	When you see an article, book, seminar or workshop that you think would be valuable to your client, do you send it to them?		
12.	When you finish a project do you get feedback from your client?		
13.	When you are visiting with clients do you listen to your client more than 50% of the time by asking good question?		
14.	Are you reading your client's trade publications?		
15.	Do you belong to the associations or industry organizations your clients belong to?		
16.	Do you personally know your client representatives, their assistant, their spouse, how many children they have, what their interests are?		
	Total		

17. List the things that are holding you back from reaching your goals: