

LEVERAGING ALLIED PROFESSIONALS TO DELIVER EFFECTIVE CLIENT PITCHES

- Ensure you have a seat at the table
- Avoid pitch pitfalls
- Produce better results!

#ILTAG66





SPEAKERS



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OUR GAME PLAN

- To arm you with TRICKS, TIPS, and the benefit of LESSONS LEARNED
- Including:
 - “Audible” - Tips for “in-the-moment”
 - “Playbook” - Long-term best practices

ASSUMPTIONS

- Aware of Legal Industry shift in our direction
- Aware of the value Allied Professionals bring to a pitch
- Experienced a degree of resistance from attorneys/internal clients

BEFORE THE PITCH



“Audible” – In the Moment

- Ask as many questions as possible – Who, where, why?
- Conduct due diligence
- Understand the client’s perspective
- Tailor your approach
- Prepare materials in advance if possible
- Assess relevant technologies/services



“Playbook” – Long Range Approach

- Create a checklist
- Collaborate and sync your portion with the group
- Create examples of solutions – visual
- Educate lawyers about tools and services
- Coordinate with other “affiliate partner” departments on a regular basis

THE PITCH



“Audible” – In the Moment

- Make the attorney look good – use humor
- Ask questions before beginning
- Identify counterparts on client side
- Leave the door open
- Read the audience



“Playbook” – Long Range Approach

- Plan and prepare
- Identify a pitch leader and a pitch coordinator
- Conduct a dress rehearsal
- Have a back-up plan
- Be a proactive relationship builder

AFTER THE PITCH



“Audible” – In the Moment

- Don't burn bridges
- It's never over until it's over
- Follow up meeting – gather lessons learned



“Playbook” – Long Range Approach

- Post-pitch reviews
- Identify post-pitch action items
- Track relevant data
- Prepare a playbook of best practices
- Learn from mistakes and build trust

THE TAKEAWAY

- Focus on HOW you deliver
- Teamwork
- Planning is critical



Questions?