

UNLOCK THE POWER OF THE SHORT LIST

Transformative Experiences

KEYNOTES
WORKSHOPS
SEMINARS



PipelinePlus has long helped professionals expand their opportunities through strategic, relationship-driven business development coaching and training. With the launch of *The Short List*, our proven methodologies are more accessible than ever, providing a clear roadmap for focusing on high-value relationships that drive growth.

Our keynotes, seminars, and workshops bring these principles to life, and our coaching programs sustain the momentum.

The Power of Focus: Drive Growth Through Your Short List

Transform your network from an overwhelming list of contacts into a strategic asset. Learn the science behind why focusing on 9-35 key relationships yields better results than maintaining hundreds of superficial connections. Then, discover how to convert those key relationships into business.

Takeaways:

- Master the "9-35 Rule" to identify your optimal network size
- Apply the 4 Cs framework (Chemistry, Character, Capability, Collaboration) to evaluate relationships
- Create an influence-scoring system that prioritizes high-impact connections
- Use the 40 Actions Matrix to advance your day-to-day opportunities.

KEYNOTE WORKSHOP SEMINAR

Strategic Cross-Selling: Expand Client Opportunities Through Trust and Collaboration

Cross-selling isn't just about offering more services—it's about deepening trust, strengthening internal collaboration, and strategically expanding client relationships. The Short List methodology provides a structured, relationship-driven approach to cross-selling that aligns client needs with firm expertise. This session will help you overcome common barriers, foster collaboration among colleagues, and implement a targeted approach to unlocking new opportunities.

Takeaways:

- Strengthen trust among colleagues to create a culture of collaboration and shared client success.
- Identify cross-selling opportunities by aligning high-value clients with firm capabilities.
- Foster collaboration by applying The Short List approach to trust, capability alignment, and mutual value creation.
- Develop a targeted action plan to initiate and sustain cross-selling conversations with confidence.

KEYNOTE WORKSHOP SEMINAR

The Connector Advantage: Unlock New Opportunities Through Your Network

Discover how to identify and activate the most valuable people in your network - the connectors who can exponentially expand your reach and influence.

Takeaways:

- Rekindle dormant contacts into high-potential contacts.
- Identify connectors using specific behavioral and influence indicators.
- Master the six steps to convert connectors into recurring referral sources.
- Create and manage advisory roundtables that transform connectors into active referral sources.
- Create and use systems that maintain a regular flow of business.

WORKSHOP SEMINAR

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Turning Prospects into Clients: The Art of The Pitch

Move beyond traditional selling techniques to a sophisticated relationship-based approach that consistently converts prospects into loyal clients.

Takeaways:

- Master the five components of a successful pitch.
- Navigate objections while strengthening relationships.
- Structure win-win fee arrangements that protect profitability.

KEYNOTE WORKSHOP SEMINAR

From Friends to Business Allies: Turning Personal Connections into Professional Opportunities

Some of your strongest business opportunities already exist within your personal and professional network—but many professionals hesitate to explore them for fear of making interactions feel transactional or uncomfortable. The Short List approach shows that advancing opportunities with friends, colleagues, and clients can feel natural and mutually beneficial.

Takeaways:

- Identify and assess the referral potential of your existing relationships.
- Master five subtle, low-pressure techniques for introducing business development into casual conversations.
- Develop a confident and conversational approach to discussing referrals and collaborations without making interactions feel transactional.

WORKSHOP SEMINAR

Conversational Business Development: The Power of the Right Words

Successful business development starts with the right conversations, yet many lawyers hesitate because they struggle with what to say. This session, inspired by David Ackert's *The Short List*, provides simple, effective phrases that help lawyers engage with confidence, build rapport, and drive business growth without sounding salesy.

Takeaways:

- Integrate practical, memorable language into everyday business conversations.
- Confidently initiate and guide discussions that lead to new opportunities.
- Build stronger client relationships while advancing deals naturally.

KEYNOTE WORKSHOP SEMINAR

Next-Gen Business Development: Building Meaningful Connections in a Digital-First World

Business development isn't about attending every event—it's about building the right relationships. For Gen Z and Millennial professionals who have launched their careers in a digital-first world, *The Short List* provides a roadmap for cultivating meaningful online and in-person connections. This session will help you confidently engage with colleagues, clients, and prospects, bridging the gap between virtual networking and real-world relationship-building to drive business growth.

Takeaways:

- Create a culture that rewards meaningful relationship-building.
- Inspire trust and loyalty through strategic relationship cultivation.
- Implement metrics that drive relationship-based growth.

WORKSHOP SEMINAR

KEYNOTE

- Pre-engagement Planning Meeting
- 45 - 90 min Live Keynote Delivered by David Ackert
- Unlimited Audience Seats
- Optional: Q&A Session
- Optional: Signed Copies of *The Short List*

WORKSHOP

- Pre-engagement Planning Meeting
- 60 - 90 min Live Workshop by David Ackert or Sr. Faculty
- Up to 50 Participants
- Post-session Meeting on Sustaining Momentum
- Optional: Copies of *The Short List*

SEMINARS

- Pre-engagement Planning Meeting
- 60 min Live Zoom Seminar by David Ackert or Sr. Faculty
- Unlimited Audience Seats
- Optional: Q&A Session
- Optional: Copies of *The Short List*



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