

# CASE STUDY



**WILLIAMS PARKER**  
ATTORNEYS AT LAW • ESTABLISHED 1925



**PIPELINEPLUS**  
POWERED BY ACKERT

## FIRM BACKGROUND

Williams Parker Attorneys at Law was established in Sarasota, Florida in 1925. With nearly 50 attorneys and international capabilities, the firm offers one of Florida's largest and most sophisticated trusts and estates practices, as well as top-tier real estate, business, tax, employment, litigation, healthcare, and intellectual property practices.

## SITUATION

Williams Parker strives to provide lawyers with business development skills and to optimize their BD efforts, as well as help them maintain their momentum over time. To enhance the business development support already provided internally, the firm wanted to engage with outside experts and optimize attorneys' efforts.

## SOLUTION

In February 2020, Williams Parker engaged with Ackert Inc. to provide business development coaching for its lawyers and gave them access to the *PIPELINEPLUS* contact management platform. The Ackert BD coaching programs were designed to improve lawyer business development performance and to address common roadblocks that impede lawyers from maximizing their rainmaking potential.

The firm's initial Business Development Training Group included nine high-performing attorneys, including four partners, who met with an Ackert coach regularly for one year. The group addressed topics such as setting SMART goals, establishing business development routines, delivering elevator pitches, prospecting, nurturing referral sources, and differentiating their practices. The coach designed the meetings to be participatory, often assigning a *PIPELINEPLUS* tutorial video beforehand to discuss during the meeting, sometimes covering topics suggested by participants, and always encouraging attorneys to share their marketing and business development success stories.

After one year, the members of the original BD Training Group formed an Alumni Group, and a new cohort of attorneys formed a BD Training Group that meets regularly. Also, to ensure its training offerings are inclusive of junior lawyers, Williams Parker engaged Ackert to work with its Leadership Exploration and Development (LEAD) cohort of associates in practice for fewer than six years. The LEAD program is intended to assist new attorneys in the growth and development of their practice. Supported by quarterly BD training seminars, the group works on communication skills, networking, strategic decision making, and community engagement.

## RESULTS

Williams Parker attorneys across these programs consistently use *PIPELINEPLUS* to track their BD activities, and several attorneys are *PIPELINEPLUS* power users. Some results include:

- A seasoned partner became a *PIPELINEPLUS* power user, and along with confidence and skills gained through Ackert coaching, went out of her comfort zone, and became an example of BD success and continuous improvement for her colleagues.
- An associate expanded her strategy to include more high-touch/high-value activities that created deeper personal connections and established loyalty with her network.
- An attorney set a start-of-program goal of identifying and prioritizing his network and doubled the size of his initial contact list.
- Another attorney discovered his ideal client was not who he initially thought and was able to move forward in his business development pursuits with more clarity, confidence and efficiency.



**Beth Collins**  
Chief Operating Officer  
Williams Parker

“Providing our attorneys with the additional support and structure Ackert coaching and *PIPELINEPLUS* offers has resulted in maximized BD efforts and results from both associates and seasoned attorneys. Through the helpful guidance of Ackert coaching, not only have individual participants set and achieved specific goals, but several individuals have distinguished themselves as leaders in helping their colleagues advance their BD activities and outcomes as well.”

See how *PIPELINEPLUS* can help your firm by requesting a free demo today.

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