



Onboarding questions for new PB Institutional Account

After reviewing the participants' bios, direct these questions to the CMO or primary marketing contact at the firm prior to the kickoff.

1. What stage of their practice years are your attorneys in?
2. What book of business do they already have in place?
3. What are their practice areas?
4. What other BD training goes on at the firm?
5. What is the level of BD sophistication of the participants?
6. How much does BD play into making partner here? What are the expectations?
7. How are originations rewarded?
8. How is cross-selling encouraged?
9. Do the lawyers have mentors?
10. Are there any specific concerns or objectives you have regarding specific participants?
11. In a sentence or two, please describe the outcomes you want to see at the end of this program.
12. Who from firm leadership will provide opening remarks at the kickoff?