

Welcome to



SOUTHREN
GROUP

Empowering people to think, be and do better.

2024

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About Us

Welcome to Southren Group, industry leaders in coaching, training and consulting for lawyers and law firms.

Whatever our clients are working on, or working towards, is where you will find us, right beside them, every step of the way.

We offer a unique-in-the-market suite of services specifically designed to address some of the most common issues facing the legal profession, and the business of law today, including: one-on-one coaching, group training programs, specialty programs/retreats and consulting services.

All of our programs have been designed to provide our clients with the insights, strategies, support and discipline they need to get them to the next level - wherever they are starting. Our methodology ensures that our clients will be armed with the confidence that comes from having someone by their side, guiding them along the way.



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Our Mission

Empowering people to think, be and do better.

At Southren Group, we strive to empower people to achieve better results by thinking about, being and doing more of the things that will drive their success. We carry this mission through everything we do, both with our clients, and within our own team.

We constantly work to develop programs and services that meet the needs of our clients and consider ourselves lifelong partners in their development.

Our Method

All of our programs and services are built on the foundational framework we created to help us achieve our mission. It is the **Know:: Be:: Do:: Method**, and here's what it means:

Know

We help you **know** what you need to know. And that's about more than knowledge transfer (though it's that, too). We help you to see who you are, understand not only what you do but how you do it that sets you apart, and we help you find clarity around where you want to go - your vision.

Be

We show you how you can **be** the attractor of - and ready for - the things, people, and opportunities that align with what you know about yourself and your vision for your future, allowing others to experience the best version of you, on purpose and so that you can have the greatest impact.

Do

We guide you toward the things you can **do**, with intention, that will bring it all together, allowing you to express who you are and what you do to the people you want to know it and in line with your future vision of success. All with intention and in alignment with your vision bringing greater ease, improving not only your success, but the quality of your life.

Our Promise

Everyone who encounters our brand feels engaged, inspired and empowered. They know what they need to know, to be who they need to be, in order to do what they need to do to drive their success.



Our Services

When we think better, we become better and are then able to do better.

All of our **Southren Academy** programs and **Southren Consults** services have been designed to provide our clients with the insights, strategies, support and discipline they need to get them to the next level - wherever they are starting. And they do it with us by their side, guiding them every step of the way.

Our One-on-One Coaching, Group Training, Specialty Programs and Consulting Services are ideally suited to firms and individuals who have identified a need for support on the path to growth. Our services supplement firm resources, and we tailor our coaching, training and specialty programs to meet organizational objectives, promoting skill development, mindset enhancement, and overall professional advancement.

All of our programs and services support individual growth while being aligned with the organizational goals of firms and legal departments. This dual focus ensures that our programs are impactful, resonating with both the needs of individuals and the strategic objectives of the organizations they belong to.



One-on-One Coaching



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Where Lawyers Come To Learn.

Get to the next level with your coach by your side.

In our highly-effective, personalized **One-on-One Coaching Programs**, our certified coaches take our clients through a series of sessions in support of business development growth, identifying and working toward specific results or the development of a strategic plan. And when just one focus isn't enough, we offer a 'just-in-time' program that has the flexibility to tailor each session to an area of immediate need.

All of our coaching programs are delivered over 12 sessions within a twelve-month period, supported by several proprietary tools and supplementary resources that help our clients to progress toward their goals, setting them up for success in their post-coaching period.

Tools include:

- DiSC Psychographic Assessment
- Goal and objective setting frameworks
- Pre-Session + In-Session Worksheets
- 6-Video Productivity Coaching Series
- **The Art of Delegation** video program
- Monthly Activity Planner + Tracker
- Self-Assessments + Progress Surveys
- Quarterly Relationship + Network Building Planner
- Personalized Social Media Calendar
- 12-Month Goal Planner + Quarterly Action Plan
- Personalized Sector Opportunities Spreadsheet

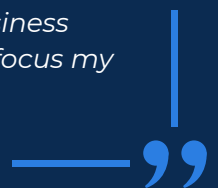


Testimonials:

I just wanted to tell you that the tools you give us for the coaching program are great. The workbooks and tools like the network building spreadsheets are really helpful. They help me stay accountable to my activity and see my progress.

The program has provided me with greater insight and clarity about how I approach my relationships and connections - not just in business development, but in all relationships.

I have a significantly increased sense of confidence, competence and enjoyment in business development. I have also become very clear on what I want to do and where I want to focus my practice.



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Career Transition + Outplacement



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Where Lawyers Come To Learn.

Your path, your ambitions; our programs are tailored to your unique professional aspirations.

No matter where you are in your career, changes happen; either changes you initiate or those that are made for you.

Embark on a journey tailored to your ambitions with our supportive **Career Transition and Outplacement Programs** for lawyers. Gain confidence, clarity, and essential tools to navigate your career changes effectively. Experience personalized coaching sessions designed to craft a plan that aligns perfectly with your unique journey and goals. Empower yourself with insightful guidance for informed decision-making at every step.

Our Outplacement Services include a range of resources and support mechanisms, such as career counseling, interview preparation, job search strategies, networking guidance, and access to opportunities. Our goal is to help individuals facing transitions to overcome challenges, regain confidence, and successfully land new roles that align with their skills, experience and career objectives.

Let us help you find your way toward a career that leads to lasting success.

“ Testimonials:

So great to start the career coaching sessions with you this morning. I'm super excited about this program and the future.

Your support during this process is greatly appreciated!! You have no idea.

The work we did together was critical in helping me find the clarity and confidence in myself to take a leap of faith that was long overdue, and the outcome has been life changing. I truly can't thank you enough.



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Know. Be. Do. Group Training



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Where Lawyers Come To Learn.

Get the results you want for you and your firm by doing the right things, from the right mindset.

Built upon our foundational principles of engaging, inspiring and empowering, and rooted in best practices of neuroscience and adult learning, our proprietary **Know. Be. Do. :: Business Development Foundations Program** is designed to guide participants, over the course of six months, through a hands-on process of developing an individualized plan that will enable them to take ownership of their practices, increase the impact of their business development activities, and create businesses filled with the type of work they want to do - with and for the people they want to work with.

Program Themes:

- **Know Yourself:** Vision, Value + Personal Brand
- **Build Your Network:** Understanding the Power of Relationships
- **Set Your Habits:** Personal Practices For Business Development Success

Program Elements:

- DiSC Psychographic Assessment
- Three 3-hour workshops
- Four one-on-one coaching sessions for each participant
- A variety of self-directed learning opportunities and tools to support them

“

Testimonials:

The program was great. This makes me excited for the future and what I can do. Before I started this I couldn't see how I would be successful in law because I couldn't see how I would build my own book of business. Now I see how that is done and can see the path to my future.

This program has been really beneficial so far... associates have banded together to leverage our collective strength as a team!

The One-on-One coaching element of the program has been a great way to put the group training into practice and make it individualized.

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Specialty Programs



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Custom tailored and co-created to achieve specific, firm-wide goals.

Under the umbrella of **SG Specialty Programs**, we cultivate transformative experiences tailored to propel your firm towards its strategic goals. Each program is meticulously and collaboratively crafted to resonate with the unique characteristics of the firm to ensure a pathway to success.

Firm Retreats:

Delivered over a series of sessions, retreats consist of topic or theme specific training and knowledge sharing, interactive workshops, and small group working sessions.

Here are some examples of retreats we built for firms like yours:

- Exceptional Beyond Technical :: 'Soft' Skills for Success
- Mindset Mastery :: Thinking + Behaving Like an Owner
- Beyond Networking :: Creating a Culture of Business Development
- The Business of Law :: Client and Practice Management

Women Managing Partner Forum:

The WMPF was designed to bring together small, curated groups of women at the helm of law firms, empowering them to work together in a series of facilitated conversations to address the unique challenges and opportunities they face. We create a supportive and collaborative environment for professional growth and leadership development, and our group members thrive as a result.

“ Testimonials:

I just wanted to say thank you on behalf of the whole team. Everyone is talking about how great our retreat session was today and about you in particular. There are very few people who can do what you do and we are very thankful.

The work you did with us at our retreat today far exceeded my expectations and hopes for what we could accomplish. Thank you!



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Strategic Planning Program



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Where Law Firms Come to Thrive.

Successful enterprises plan for their success.

In our **Strategic Planning Program**, we take firms through the process of creating a comprehensive, actionable Strategic Plan. Not a plan that will sit in a drawer collecting dust, but a plan that will get them into action and moving forward toward their vision for success in specific, measurable ways.

We work with firms to distill what they need to know, who they need to be, and what they need to do to evolve themselves and their practices in line with their business goals and objectives.

Our clients use their strategic plans as the roadmap for their business going forward over the short-, mid- and longer-terms. Because they are created in a collaborative, facilitated way, over a series of sessions spanning over several months, with input from all levels of the firm, our plans get off the ground and stay moving forward, right from day one. They provide firms with living, breathing frameworks that they not only check in on consistently, but engage with, add to, update and test constantly. In short, our clients' Strategic Plans work.

Program Goals:

- Clearly define who you are, who you want to be based on your values and vision.
- Set and commit to a future vision.
- Create a roadmap to achieve your vision including objectives, initiatives, tasks and tools.

Program Elements:

- Live + virtual workshops and small-group coaching sessions
- Inter-session independent work
- Tools + Resources to support the plan development
- Project management tools



Small Firm Start Up



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Where Law Firms Come to Thrive.

Launch With Confidence

Starting your own law firm is an exciting journey, but it comes with unique challenges that require a blend of legal expertise and business acumen. Our Small Firm Start Up Program is designed to equip solo and small-firm practitioners with the tools, strategies, and support needed to thrive in a competitive market.

We understand the intricacies of starting a law firm and are dedicated to being your partner in success. Our Small Firm Start Up Program is your roadmap to balancing legal prowess with business excellence, helping you build a thriving, sustainable practice.

Program Highlights:

Vision and Planning: We help you define your long-term goals and develop a comprehensive business plan tailored to your unique value proposition.

Operational Excellence: Learn to streamline office management, leverage reliable IT solutions, and implement efficient processes to reduce administrative burdens.

Financial Management: Gain insights from professionals on handling your finances, from accounting to bookkeeping, ensuring your firm's financial health and stability.

Strategic Delegation: Focus on what you do best—practicing law—while we guide you on delegating key functions such as facility management and administrative tasks.

Risk Management: Prepare for potential challenges with contingency plans, ensuring your firm can navigate unforeseen obstacles smoothly.

Expert Consultation: Benefit from our expert advice and support, tailored specifically to the needs of solo practitioners and small law firms.



Fractional Law Office Management



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Where Law Firms Come to Thrive.

Empowering Your Firm With Strategic Support, When you Need It.

Our **Fractional Law Office Management** services are designed to help smaller law firms not just manage their operations but transform them. We guide your firm through strategic projects that optimize efficiency and growth. Whether it's improving administrative systems, enhancing financial stability, or ensuring compliance, we offer project-specific support that drives your firm forward.

With our tailored, scalable solutions, your firm can thrive, ensuring you're always operating at peak efficiency and focused on long-term success.

Key Outcomes:

- Strategic Oversight and Operational Transformation
- Reduced Administrative Burden on Lawyers and Staff
- Cost-Effective, Project-Specific Support
- Improved Financial Management and Long-Term Stability
- Proactive HR, Compliance, and Vendor Oversight
- Greater Focus on Practicing Law and Serving Clients



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Our Team

United by purpose and a desire to help others thrive.

We Are Southren Group...



Jane Southren
Founder,
Chief Culture Officer



Teresa Krupa
Co-founder,
COO



Kelly Margani
Director, Strategy +
Growth



Christine Shimoda
Director,
Training +
Development



Stephanie Cudmore
Marketing +
Communications Manager



Elisabeth Folk
Business Operations
Specialist



Rebecca Marquez
Administrator



Kim Neeson
Coach + Facilitator



Alisse Houweling
Coach + Facilitator



Kelly Caldwell
Coach + Facilitator



Rachel Barbaro
Coach + Facilitator



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