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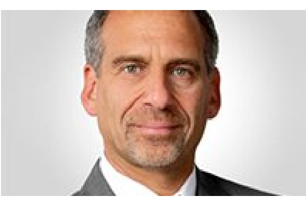
LEGAL INDUSTRY/BUSINESS MANAGEMENT

Keep Your Friends Close and Your Prospects Closer

Techniques for staying connected to important targets

Ask any salesperson, and they'll tell you same thing — selling is a full-contact sport. For high-level engagements, where trust is a cornerstone for landing the work, relationships must be built, and that process can take time. It requires ongoing, high-value contact to form favorable impressions and stay top-of-mind.



DAVID H. FREEMAN, JD
Founder, Law Firm Culture Shift

The related problems are twofold.

First, our lawyers don't necessarily know the rules of this game. By most accounts, it takes 7 to 12 contacts to close a deal. Yet, most lawyers don't realize they should measure themselves on the number of *quality* touches they make with top priority targets.

Second, even if they know how to keep score, many don't understand how to play the game at a high level. They don't have a toolkit, or a set of approaches, for reaching out on a regular basis.

To help your lawyers navigate this challenging terrain, the following tips will provide a variety of techniques that can help them go for the win.

TARGETING

The first step is to focus — lawyers can't give a high level of attention to everyone they know, so they must prioritize. They should take a good look at their contacts and develop an "A" list of the most valuable people they know (or want to know better). This group can come from a wide variety of sources, including:

- Current clients
- Former clients
- Clients of other lawyers in the firm
- Referral sources
- Opposing counsel

- Prospective clients
- Friends and family
- Alumni (of the firm and schools)
- Community leaders
- Associations/boards
- Media
- Personal passions/hobbies

The folks on this list should receive the most frequent and personalized touches.

For others — the "B" or "C" prospects — a plan should also be developed for ongoing outreach, but with a lesser commitment of time and energy. Keeping them on an email distribution list, with a periodic call or visit, could be an appropriate way to stay on their radar.

QUICK HIT 1

The first step is to focus — lawyers can't give a high level of attention to everyone they know, so they must prioritize.

MAKING CONTACT

Few people love a cold call, whether it's the caller or the recipient. Making contact that is welcomed and valued is the key to successfully nurturing relationships. To that end, the following are some approaches that can be used to kick open the door for a conversation.

- **Current events:** Keep an eye out for relevant news, and use the information as a reason to make contact. Example: "Hi John, I noticed you were just promoted to head of the division. Congratulations! Is there anything we can do to help you in your new position?"

- **Review:** Offer to look over some policy, procedure or document. Example: "Hi Fran, I wanted to get in touch because it's been a while since we looked at your employee manual. I'm happy to send it to our employment team, at no fee to you, for a quick review."

- **Practice focus:** Discuss a specific area of law that is highly relevant for them. Example: "Hans, our team was thinking about you because, as you know, there are many new health care regulations. We thought it might be helpful if we came out to do a short presentation on areas that will definitely impact you and the company."

- **Matter management:** Tell them how you've helped similar businesses solve problems. Example: "Hi Theresa, I'm getting in touch because we recently helped a client develop some creative ways to defend against claims that are similar to yours. We thought you might want to hear about some of the approaches we've developed."

- **Goals/client service:** Make contact to learn about how well your firm did for a client over the past year, identify their goals going forward, and see if there are ways you can help. Year-end is a great time to use this approach. Example: "Hi Patel, it's been about a year since we had our last check-in. We'd love to have a conversation to learn what we can do to help you achieve your goals for the coming year, and we'd also welcome your feedback on our service."

- **Colleague:** Offer an opportunity to co-present or co-author with you. Example: "Hey Katarina, I've been asked to present on a topic that's in your sweet spot, and I thought it would be great to co-present with you. Would you be interested?"

- **Social:** Reach out with something fun they would enjoy doing. If you and your contact have families, suggest something that would be enjoyable for all of them. Example: "Hi Damon, I have some tickets to the Disney On Ice 'Frozen' show. Would you and your family be interested in joining my family to see it?"

QUICK HIT 2

To this day, large clients still report that few (if any) outside lawyers take the time to visit them at their place of business. But doing so can help the relationship on many levels.

OTHER TOP-OF-MIND TECHNIQUES

Given that your lawyers must engage in multiple touches over time, the following list offers several approaches to keep building that relationship.

- **Join clients for their strategic planning sessions:** This is an underutilized tool that is highly effective for deepening relationships and meeting other decision-makers inside the client's organization. By offering to join their planning sessions (usually for no fee) during segments where your lawyers can add value, they become the experts in the room. They can uncover issues that may not have been discussed with other law firms yet, and they get to "audition" for other leaders who might need a lawyer in the future.

- **Make time for on-site visits:** To this day, large clients still report that few (if any) outside lawyers take the time to visit them at their place of business. But doing so can help the relationship on many levels.

  Betsy Spellman, Chief Marketing Officer at Steptoe & Johnson PLLC, has seen this in action. "Our lawyers regularly report … those beautiful moments when a client says something like 'Hey, while you're here, do you have a minute to talk about this other issue we have?'" Reasons for suggesting a visit can include conducting a presentation, visiting to see a new plant, product or process, and conducting office hours (such as spending one morning a month at a client's location doing their work).

- **Business leads:** Your firm has lots of good chips to offer to others in the way of introductions to people who might help them achieve their business goals. Lawyers who are great matchmakers can build a huge pool of goodwill that usually comes back to benefit them.

- **Attend conferences:** Clients, prospects and referral sources congregate at their industry events, so your lawyers should also be there. One of the most highly regarded factors in hiring a lawyer is that they understand the client's business and industry, so going to these conferences both increases their knowledge and demonstrates their commitment to that industry.

- **Pro bono:** If your lawyers are investing time in pro bono activities, have them find places where their targets are volunteering as well. There's a lot people can learn about each other while building a house together.

QUICK HIT 3

If the lawyer has done a good job of conducting meetings, building rapport and trust, and identifying some needs, then the time might be right to move things to the next level.

- **Start a group:** This is one of my favorite techniques, especially for helping your lawyers find a reason to meet people they want to get to know. For example, in a specific region — perhaps for an emerging company lawyer — there would be value in facilitating a gathering of up-and-coming entrepreneurs, bankers and funding sources.

- **Get your firm bio on LinkedIn:** This is where the prospect may be making the first move prior to making any contact, to get a feel for the lawyer and how well they might serve a need. This is an overlooked but often crucial first step in the engagement process, so make sure your lawyers are putting their best faces forward in these areas. (Be sure to read "*Is Your LinkedIn Profile Violating Attorney Advertising Rules?*")

GETTING THE NEXT DATE

Just as few people get married on the first date, the same holds true with business development. Lawyers need to get ongoing dates before they can pop the question.

So, after your lawyers get an initial meeting, how can they follow up? And once they've had a few meetings and the relationship has hit the next stage, how can they elegantly ask for the work? If the lawyer has done a good job of conducting meetings, building rapport and trust, and identifying some needs, then the time might be right to move things to the next level.

Beth Cuzzone, Director of Client Service and Business Development at Goulston & Storrs, says they take a sincere approach to relationship-building, rather than selling.

"Lawyers are trained to solve problems so we guide them to approach all meetings — prospect and client meetings — as an opportunity to identify an issue, problem or need. After that, the offer of solutions comes naturally," says Cuzzone. "We have a fairly good habit, collectively as a firm, never to leave a meeting without a follow-up action item, even if that item isn't about getting hired. It could be an invite to attend an event as our guest, or an introduction to a potential customer, or something as simple as 'I have a partner who published an interesting article on that issue — I'll send it to you.'

"It's about keeping the relationship meaningful — the legal work or referral will come."

I suggest using questions to test your prospect's readiness to take any next steps. The following list provides several examples to consider. (You'll note they also increase in forwardness — at different stages of a relationship, different questions can be appropriate.)

QUICK HIT 4

Your job as a leader is to provide bridges between potential and implementation through teaching, reminding, managing, tracking and rewarding.

- So, we talked about a lot of different things today. Where do we go from here?
- When should we follow up with you on this?
- Would you be interested in having us conduct a preliminary review?
- We have a person in our firm who does just that type of work. Should we get the two of you together?
- Do you have a firm that does this type of work for you?
- Perhaps you can try us out. Would there be an opportunity for us to work with you on your next matter?
- We'd like the opportunity to work with you on this matter. Is there a way that can happen?
- Do you have a preferred list of law firms you use for those types of matters, and is there a way we can get on that list?
- Would you like us to handle that for you?
- Do you have a strong No. 2 firm when there are conflicts or overflow?

There is no shortage of methods for building solid relationships with high-value prospects. Your job as a leader is to provide bridges between potential and implementation through teaching, reminding, managing, tracking and rewarding. With the right training and structures in place, your lawyers will maximize their relationships, resulting in more work and greater client loyalty.

ABOUT THE AUTHOR

David H. Freeman, JD, is Founder of Law Firm Culture Shift. He's also a best-selling author who has written four books on leadership and business development. He has worked with 180 law firms and has repeatedly been voted the best law firm business development coach and consultant in a major nationwide survey. He's also a Fellow in the College of Law Practice Management.

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