

7 Reasons to Design a Law Firm Sales Process

By [Steven M. Bell](#) on December 12, 2023

A recent survey conducted by *Chief Sales Officer Insights* – a survey about achieving revenue goals – determined that a vast majority of companies are still flying by the seat of their pants when it comes to formalizing, reviewing, and measuring their sales processes. The survey did not even cover the law firm vertical, where the phrase “sales process” is virtually unheard of.

Is that a problem? Maybe.

“If you can’t describe what you are doing as a process,” said quality and efficiency guru W. Edwards Deming, “you don’t know what you’re doing.”

I would never contend that law firms don’t know what they are doing. They are populated with brilliant individuals who solve unimaginably complex client issues. And they generate large, profitable revenue streams. Like all industry verticals, they have their flaws, but for most of them, not having a formal process does not mean that they don’t know how to sell. More likely, they have not yet seen the benefit of analyzing what works, documenting it, and replicating it.

Should they do so? If they’d like to outperform peers, yes.

The survey mentioned above concluded that a business with a formal sales process that is defined in writing and regularly reviewed delivers substantially better performance than those with ad hoc or informal sales processes.

For law firms, crafting a sales process need not be complex. We have [written frequently](#) on the topic of [how to](#) do so. Basically, it involves capturing and analyzing case studies of how today’s key clients progressed from unawareness of the firm to awareness, interest, consideration, engagement, expansion, and finally – the most-desired stage of the process – to strategic, institutional clients.

Implementing and sustaining a sales process is more challenging than arriving at one in the first place. We’ll cover that topic in a future *INSIGHTS* article. Meantime, here are seven good reasons for a law firm to start building one now.

A sales process:

1. **Helps a firm focus.** A good sales process defines with great specificity the client base of the future and the steps required to acquire that client base.
2. **Elevates brand.** A firm’s sales approach can be a valuable part of its reputation in the marketplace. Think “The McKinsey Way.”
3. **Facilitates management’s ability to track and measure performance.** This includes monitoring key performance indicators (KPIs), analyzing conversion rates, accurately predicting revenue, and identifying areas for improvement.
4. **Promotes efficiency.** A well-constructed sales process defines the role of each function or participant, ensuring that the steps are taken in the right sequence, completely, and at the right time.
5. **Reduces stress on the part of professionals for whom sales is not the first choice of tasks.** A sales process is little more than a business ‘to-do’ list, which only remotely resembles the “salesly stuff” that so many disdain.

6. **Facilitates integration of marketing and sales (not to mention other departments).** A sales process begins with professionals who help make prospective clients aware of the firm and its offerings and extends through client service professionals delivering a deeply satisfying experience. Every function in a client development department – indeed in the whole firm – plays a vital role in the successful execution of the whole sales process.
7. **Runs on its own.** Lawyers and staff professionals alike often are amazed when a sales process delivers a new client or additional high-value work for an existing client...almost by magic. Sometimes, just taking the steps results in a client getting to “yes” with virtually no selling in the sense that many people construe it.

Professionals in LawVision’s Client Development and Growth Practice have developed successful processes for sales departments at large companies as well as for leading-edge law firms. **If you are interested in learning more, please contact [Steve Bell](mailto:Steve.Bell@lawvision.com) (202.421.5988), [Silvia Coulter](mailto:Silvia.Coulter@lawvision.com) (617.697.4869), or [Jim Cranston](mailto:Jim.Cranston@lawvision.com) (817.310.6299).**