

A Legal Sales Client Team Story (aka Strategic Account Team Must-Haves)

By [Silvia L. Coulter](#) on November 14, 2018

Excited about launching a new client team program, an 800-lawyer firm had everything in place. Leadership from the top and key stakeholders were strongly supporting the focus. They appointed five partners who had significant client relationships as the team leaders and suggested they build the teams and come up with team plans. After five months the excitement fizzled and attendance at the monthly team meetings was sparse. Team members delayed their tasks and missed deadlines. What happened? We see this in more than just this client firm.

Here are the strategic account team “must-haves” in order to drive significant revenue.

- **Team Members:** Teams should have no more than 7 members. No sales team works at their optimum performance level if they are too big. The suggested team members include at least one senior partner, two mid-level partners, and one junior partner who have strong client relationships, two to three associates at various levels, and a strong sales person on each team.
- **Sales Training:** Sales training is a must. In fact the big sales teams in corporate America, Big Four, and other significant organizations go through sales training once a year. Learning these key skills and being reminded of them regularly is critical to sales success at winning new business and growing revenue.
- **Team Leader Training:** How many partners in law firms are trained in management and leadership? Generally not many. To effectively lead a strategic account team, take the time to train the firm’s team leaders in how to manage strategic account teams. Otherwise, the team may never be as good as it could be with strong team leadership.
- **Client Involvement:** Clients must be involved with the strategic account planning process. Especially if it’s about their business! Without client involvement, there is a possibility of lawyers meeting regularly and bloviating about their knowledge of the client, boring everyone else on the team. Clients will tell you what’s going on, what their strategic growth goals are, and what’s important to them. This is an absolute must.
- **Co-Team Leaders:** Teams must meet on a regular basis. Properly designed, a strategic account program should be the umbrella over offices, practices, industry groups, and all other firm planning. Strategic accounts often make up 80-85% of any firm’s revenue. If the team leader is not able to meet, the team needs to meet regardless, so the process keeps moving forward. Co-team leaders or a vice team leader is best for optimal team performance.
- **An Assistant for Meeting Minutes:** Business Development professionals are not there to take notes. They are there to provide strategic sales and business development assistance, ideas, and issue-spotting for the team. A good assistant will be helpful for drafting the monthly agenda with follow up items from the previous meeting.
- **The Client’s Strategic Plan:** If partners are afraid to ask for this, then their relationship is absolutely not where it needs to be. A “partner” to the client will definitely be seen as an adjunct member of the client’s own team. They would want their outside counsel to know their strategic goals. Just ask! A strategic account team is not as effective without alignment to the client’s strategic goals.
- **Business Development Support:** The best support a firm can have for its strategic account management program is a strategic sales person with experience. As a team member, there is no better strength than to have a sales person who knows how to help the partners and the team close business and grow client relationships. If partners

don't have faith in their business development pro, then find someone who they do have confidence in. Teaming up with sales professionals will often mean winning new business and competing much more effectively.

- **Meeting Agenda:** Don't wing it. You would not do that for a client meeting. These meetings are important and need to focus on the future and sales strategy for retaining the client and winning new business. Keep action items strategic in nature and have a clear purpose and identified outcome for each action step.

Following these best practices for developing and maintaining successful strategic account teams will help the firm focus, grow, and prosper.

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