

Back to Basics in Law Firm Sales

By [Steven M. Bell](#) on November 26, 2024

When it comes to sales at law firms, simpler is better, largely because the owners of these unique businesses place the highest priority on their legal work and have limited time to learn and do sales work.

That's why business professionals who advise and support lawyers on sales sometimes just need to focus on the most-basic principles. In preparing for a panel discussion on law firm sales, I returned to professional-services source materials from PwC, which long ago was a pioneer in professional services sales.

All PwC partners and senior managers were taught that sales is but a process – “a multi-step methodology that is teachable, repeatable, structured, sequential, and manageable.” *

A sales process, the accountants learned, transforms products/services into revenue in the most cost-effective way possible.

They also were taught that a sales process is comprised of several big steps, each supported by large numbers of small sub-steps.

This way of thinking about sales was warmly welcomed by PwC accountants way back when, just as it is by lawyers today. After all, lawyers are completely familiar with processes. They regularly employ firm-approved processes for document reviews, preparation of patent applications, or setting up virtual deal rooms. For lawyers, it's not a huge leap to understand sales as simply another professional process.

Here are examples of some of the big steps that a lawyer might plan as part of a sales process:

- identify by name the companies desired as clients
- gain an introduction to a specific buyer
- ensure that the firm is on the preferred provider list of a target company

As we mentioned, each of these big steps contains many sub-steps. For instance, the second big step listed above – gaining an introduction to a specific buyer – might be supported by sub-steps such as:

- Reviewing the buyer's social media profile, media mentions, firm biography, and charitable activities
- Identifying individuals in the buyer's network known to other firm lawyers, or
- Writing an e-mail inviting the prospective client to a relevant CLE event.

Mapping out the steps and sub-steps reveals that most of the required selling actions at law firms can, and in reality are, best handled by business professionals other than lawyers. That's good news for everyone. Lawyers are thrilled to learn that they can be inserted into the sales process only when it is absolutely necessary, and business professionals are happy to know that they play important roles and can keep things moving even when a lawyer might not be available to

participate.

There are lots of new innovations in the law firm sales business. Sometimes, though, it is worthwhile just to return to the basics.

Sales process articles, such as [How to Install a Sales Process at Your Firm](#), can be found in the LawVision [Insights for Law Firm Leaders](#) blog.

**PwC (then Price Waterhouse) relied on foundational principles described by Robert Miller and Stephen Heiman in their pioneering books, "Strategic Selling" and "Large Account Management."*

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