

## Closing Sales Open Loops

By [Steven M. Bell](#) on April 16, 2024

When Business Development (BD) professionals and the lawyers they work with use the word “closing,” they primarily mean acquiring a new client or a new piece of business. But there’s another type of closing worth attention: closing the open loops at all points of the sales process.

Open loops are tasks that are not completed. It’s important to address them because humans remember and focus on incomplete tasks more than they do on completed ones. Discovered by Russian psychologist and psychiatrist Bluma Zeigarnik in the 1930s, this tendency is called the Zeigarnik Effect. And while she wrote about the effects of open loops on humans generally, the theory has implications for professional services sales.

Those who advise lawyers in business development and sales see the Zeigarnik Effect at play every day as they help client-facers identify prospective clients to pursue or existing clients for expansion. BD and sales professionals invest a lot of energy and time to conduct preliminary research and analysis, specify targets, plan pursuits, and identify a cascade of next steps, responsibilities, and deadlines. And then, unfortunately far too often, they watch in dismay as tasks just are not completed.

For all of the great and highly complicated tasks that lawyers handle easily, they sometimes have difficulty dispatching routine sales actions such as studying a prospective client’s background dossier, sending an e-mail, making a phone call, conducting a needs assessment, asking a colleague for a referral, following up on a timely basis, updating pipeline reports, and other such routine aspects of transforming a target into a new client or expanding work at existing clients.

Lawyers aren’t the only ones who create open loops. It takes a village to generate sales, and professionals from diverse departments – Marketing, BD, Finance, Knowledge Management, and others – all have important roles and can succumb to creating open loops by not finishing assigned tasks on a timely basis.

Sales open loops are debilitating and cumulative. It is dispiriting to the whole organization when there are thousands of untouched listings in a Client Relationship Management System. Leaders and managers become frustrated when progress reports are static. Some individuals with incomplete task lists experience guilt, others rationalize, and morale suffers. An organization with too many open loops – and the fallout that they create – is not high-functioning. It’s just not fun and energizing to be part of an enterprise that can’t seem to get sales loops closed, and the opposite is true at organizations that “just do it” on the sales front. “It’s exciting, energizing, and – yes – joyful to work at those places.”

It’s all the more frustrating given that the simple act of closing sales open loops invariably leads to the other, more-desirable type of closing – the winning of new business and all the joy that success brings.

Here are some steps that can help organizations close those open loops and get on with winning:

- **Lead by example.** Leadership should consciously create a culture of closing open loops. Leadership should publicly report their own loop closures and then hold the whole organization responsible for doing the same.
- **Celebrate loop-closing actions.** Efforts to close loops sometimes result in wins, and sometimes they do not. Even the most-accomplished law firm sales professionals win new work from only a fraction of all the prospective

clients on their target lists. Wins should be celebrated, for sure, and so should the fact that the right steps were executed regardless of the outcome.

- **Target carefully.** Law firms should work hard at generating well-conceived lists of targets (or existing clients for expansion). The better the target list – prospects and clients known to be good fits – the more successes and the fewer disappointments. Ruthlessly trimming prospective-client lists is an effective and completely rational way to close sales open loops. And to win.
- **Resolve all opportunities.** Recognize that, in sales, a client’s “yes” is the best answer. Another excellent answer is a definitive “no, thanks.” A terrible answer is “maybe,” which creates and perpetuates the dreaded sales open loop. So, be brave. Ask questions and take actions that create resolution. This blog post is not about questions that create closure, but it’s easy to find them. LawVision Co-Founding Principal Silvia Coulter offered advice in [this article](#). Many additional ways to resolve opportunities can be found by querying search engines for “sales closing techniques.”
- **Strive to be resilient.** Almost always, “No, thanks” is the prospective buyer’s way of saying that to the seller: “What you are offering is not a good fit for us at this moment.” “No, thanks,” almost never means “don’t ever try again!”
- **Be open to help from others.** Nobody in the legal profession knows how to do everything. Fortunately, resources abound, either within the firm or nearby. Someone knows how to close the open loop you may be facing. Reach out to find them.

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