

# Driving Law Firm Revenues: Quick Tips for Making Client Teams Successful

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Studies in the legal market consistently show that most client team “programs” are not doing well and that many firms do not even have a focus on key clients. Here are some quick bullet points to consider for enhancing the firm’s client team strategy.

## **To Do or Not To Do**

Regardless of firm size, the most successful revenue growth strategy is to have what we call a SAM-Legal strategy. (SAM stands for Strategic Account Management, a focus on strategic (aka key) clients. Without a strong focus on strategic accounts (for a B to B firm) or strategic markets (for a B to C firm), any firm’s long-term success is in jeopardy. SAM is a must-do strategy.

Here are some key elements and quick tips on what creates low-performing teams and what facilitates high-performing teams.

## **Client Teams—High Performers/Low Performers—What Makes the Difference?**

### ***Low Performing Teams—When Teams Can Improve***

#### *Team Leaders*

- Poor planning
- Team meetings are postponed regularly
- No Vice-Chair—too dependent on one leader
- Too analytical; analyzes versus acts
- No sales training or account management skills training or experience
- No or little accountability to firm leadership or to team members and others who service the client
- Do not hold team members accountable and vice versa
- Build teams that are large versus nimble

#### *Team Members*

- Unclear about their role/have not confirmed role with leader

- Reactive versus proactive about ideas
- Lack confidence to challenge each other's and team leader's thinking
- Lack sales training and are unable to build effective relationships at their level within client organization
- Unprepared for meetings; do not follow through on active, open tasks

### *Business Development Professionals*

- Note-takers versus strategic advisors
- Do not see their role as coaches to help motivate/encourage Not informed about client goals
- Reactive versus proactive about value-add opportunities
- Have not had sales training or any sales or account management experience
- Focus on reporting history and current WIP versus facilitating conversation about potential

### ***High Performing Teams—You Can Make the Difference!***

- Team tactical information
- Budgets
- Post pitch debriefs
- Client interviews (aka client satisfaction surveys)
- Investor relations communications
- Daily newsworthy events—impact on client/impact on RG
- Daily tracking of decision-makers who are key to the relationship with RG
- Report and suggest actions
- Encourage (demonstrate leadership)
- Proactive (anticipate needs; think strategically)
- Patient (not discouraged)
- Persistent (not argumentative)
- Prepared (review and understand relevant data)
- “Partner” with team leaders outside of team meetings to discuss strategy/ideas
- Own responsibility for success of the team
- Proactive about providing information
- Visit counterpart at client organization; get to know the procurement people
- Attention to the supply chain/vertical market of clients and what is going on that may impact the client

- Stay abreast of team and industry initiatives, e.g., where are R&D investments being made? What supply chain challenges does the industry face?
- Encourage team leaders to be their best

### ***Encourage Team Leaders to be their Best***

#### ***High Performing Teams—Where Business Sales Professionals May Influence Team Leaders***

- Suggest they recognize and value others; compliment input and accomplishments
- Help facilitate team conversation
- Help team leaders look good—Prepare for meetings
- Suggest assigning a Vice-Chair and potential successors to team leadership
- Demonstrate confidence—you are their “partner” for client teaming
- Suggest inviting client(s) to join team meeting at least once a year
- Help to define roles and metrics for reporting to firm management
- See revenue as a by-product of successful client engagement through team efforts versus as the only goal
- Help create a sales pipeline

### **The Intersection of Client Visits and Client Loyalty**

- Know the difference between client meetings, firm leader visits, and client interviews
- Identify the correlation between above and team success
- Communicate clients’ views and expectations about client service
- Send value propositions to the client to align with their business goals and do so proactively—do not wait to be invited
- Invite the client to team meetings—things will go much better

Read about these and other successful SAM-Legal tips in our upcoming book, “SAM-Legal: From Key Clients to Strategic Accounts,” which will be available on Amazon.