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

By Silvia L. Coulter on September 24, 2020

By Silvia Coulter and Steve Bell

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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,” due out in September/October 2020 on Amazon.

About the Authors:

Silvia Coulter is a Co-founding Principal of LawVision Group. Silvia Coulter is widely regarded as one of the legal industry’s most experienced business development and leadership consultants. Her experience includes working as a former strategic account executive and sales leader at a Fortune 50 company, a chief marketing and business development officer at two global law firms, and consultant and facilitator to professional services firms across the globe. She was an Adjunct Professor at George Washington University’s College of Professional Studies in the Master’s in Law Firm Management program (2010-2019), a co-founder of the Legal Sales and Service Organization (www.legalsales.org), a Past Elected President of the Legal Marketing Association and an elected Fellow of the College of Law Practice Management. She is a frequent speaker and facilitator at professional service firm retreats and legal industry meetings. Silvia is the co-author of three books: The Woman Lawyer’s Rainmaking Game, Rainmaking Advantage, (due out Summer 2020) and SAM-Legal: From Key Clients to Strategic Accounts (due out Summer 2020). For more information please contact Silvia L. Coulter at scoulter@lawvision.com or 617-697-4869.

Steve Bell is a pioneer of law firm Sales and Business Development. In 2001, Steve created the legal profession’s first sales function at Womble Carlyle Sandridge & Rice (now Womble Bond Dickinson) and has consulted with professional services firms around the globe on establishing and operating sales departments, navigating ethical requirements and designing compensation systems for professional services salespeople. Steve has helped law firms navigate opportunities and challenges resulting from unforeseen global events including 9/11, the dot.com bubble burst, the “great recession,” and now the Coronavirus crisis. For more information please contact Steve Bell at sbell@lawvision.com or 202-421-5988.