

Get to the Point (of Sale): Client-Facing Possibilities for Law Firm Professional Staff

By [LawVision](#) on June 12, 2023

“Commitment to help.” This is, according to BTI Consulting CEO Michael Rynowecer, one of the top [attributes](#) that buyers demand from their law firms. That’s old news; here’s the new news: More and more, law firms have awakened to the potential of professional staff, in addition to lawyers, interacting face-to-face with clients and prospective clients.

This is partially the result of legal-services buyers being open to relationships with law firms’ business professionals. At last week’s Legal Sales & Service Organization Raindance Conference, three general counsels were asked their views about working with professionals other than lawyers, and – for the second straight year – they answered “yes” to the following three questions:

1. In the past two years, has a law firm sales professional approached you in order to sell legal services to you or one of your associates?
2. Would you be open to meeting a law firm sales professional who is not a practicing lawyer?
3. Would you be interested if your law firm offered to assign you a “strategic account manager?”

“Long gone are the fears that if a client meets with a ‘nonlawyer,’ a trap door will open, sending the staff professional to a fiery hell,” laughs Womble Bond Dickinson partner Press Millen, who in 2000 was the architect of what is commonly believed to be the profession’s first direct-sales function.

The concept of staff (not just salespeople) facing clients was reinforced recently in Law.com commentary by Schulte Roth & Zabel Co-managing Partner Marc Elovitz. “Clients,” he wrote, “should get the benefits that come from working with business professionals in knowledge management, IT, communications, marketing and business development and practice support, among other groups.”

“Law firm staff professionals are bright, articulate, talented individuals who offer many additional avenues for serving clients,” says Millen. “If they can help clients and add value – and they can – why would you leave them on the bench?”

From the outset in the early 2000s, the Womble sales team was not just allowed, but also expected, to be client-facing. Among their responsibilities:

- Initiate meetings with prospective clients and conduct needs analyses.
- Advance relationships, including, especially, introducing lawyers skilled at addressing the identified needs.
- Serve as an additional communications channel between client and service team.
- Conduct formal and informal client satisfaction interviews.
- Design ways to build out and institutionalize business relationships, i.e., create and manage Strategic Accounts.

While law firms’ sales professionals were the first wave of marketing and business development staff operating at the point of sale, other components of client development organizations such as research, communications, and event

management are showing up prominently on the front lines as well, and for good reason. Most businesses prioritize sending resources not to staff functions such as the legal department, but rather to close-to-the customer parts of the enterprise such as product development and technology and sales. Stepping into the resulting void is one of the most important ways that professional staff can demonstrate commitment to help.

Here are some of the many ways that my colleagues and I see law firm professional staff operating at the point of sale:

- Ensure that your law firm, when possible, buys the products and services of the client's or prospective client's offerings.
- Host in-house counsel teams at offsite meetings in the law firm's facilities, welcome them, and be nearby as they meet.
- Inform in-house counsel about open positions that might be a fit for them.
- Provide communications, design, presentation, and other support resources that are not always easily obtainable by in-house legal professionals.
- Help in-house counsel build their personal brands by identifying and supporting their writing and speaking appearances.
- Follow in-house counsel and other executives on social media and promote their on-line ideas and personas.
- Be an off-the-record sounding board and confidante.
- Provide organizational and production support to in-house counsel's leadership of professional organizations such as the Association of Corporate Counsel or trade organizations.
- Support causes of in-house counsel or their companies, including serving on boards of not-for-profit organizations important to them.
- Teach them how to sell, including how to restore dormant relationships and open new doors. In the corporate world, everyone – including in-house lawyers – is expected to sell, and like all lawyers – in-house or in private practice – they may not have experience in this.
- Provide access to industry and competitive research they might otherwise not receive.
- Introduce in-house counsel to their peers whom you know to have the same interests and causes.

These are just a few ideas about how marketing, business development, and sales professionals at law firms are demonstrating a firm's commitment to help. If you have other ideas, please send them along so we can catalogue them.

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