

## How Law Firm Leaders Help Their Teams Ring the Cash Register

By [Steven M. Bell](#) on April 4, 2023

As soon as a new lawyer joins a law firm, they get wind of the fact that acquiring new clients and finding new work at existing clients are key to promotions and increased compensation.

Likewise, lawyers who become firm leaders quickly learn, if they did not already know it, that a big part of the job is revenue generation – leading and managing sales.

To help new and mid-career lawyers get better at sales, law firms have turned to outside trainers or coaches, or firms have developed their own business development curricula.

Managing partners, by comparison, are largely left to their own devices to figure out how to become sales *managers* – a discipline related to but quite separate from sales proper.

Both of these areas – sales and sales management – might appear at first glance to be daunting, but it doesn't need to be so.

We emphasize for our law firm clients the importance of putting in place a sales process as a way to break down sales into a sequential series of tasks, each of them easily accomplished even by those who have never had formal sales training. We mention that here because when managing partners operate in the role of sales management, they simply are overseeing a process.

We have written extensively about how a law firm can develop a sales process unique to it. (See recent blog posts on this topic—[here](#) and [here](#)—or read a more comprehensive explanation of sales process in [our book](#): “SAM-Legal: A guide to law firm strategic account management.”) While each law firm's sales process is unique based on its specific facts and culture, every firm's sales process comprises a few key ingredients:

- Select targets for pursuit (or existing clients for expansion of relationships)
- Conduct research
- Develop “angles” that will open doors or constitute a legitimate business reason for a client meeting
- Initiate a first meeting in the case of a prospective client, or value-added meeting in the case of an existing client
- In the meeting, listen carefully, identify next steps, and schedule the next interaction
- After the meeting, take those next steps in a timely manner
- Repeat this process until the prospective client makes the hire, often with words such as, “I'd like you to do x”

That's how clients are won and engagements are landed at law firms. It's just a process, not a mysterious dark art.

Every professional smart and talented enough to land a job at a law firm easily can handle these steps. Sometimes, they need additional assistance with a step such as opening the door for the first time or making sure that follow-ups remain a high priority. But, by and large, any lawyer can – in the context of being a consummate professional – achieve each of

these steps *en route* to a win.

And what of the managing partner acting as sales manager?

Help the lawyers on the team select targets that align with firm (or office, practice group, or industry group) strategy. In this way, a managing partner can ensure that the finite, precious client-development time and money will produce results in the intended places.

Managing partners also should insist that all team members keep track of where they are in the process. After all, the sales process steps listed above produce binary answers to questions such as:

- Did you select strategically aligned targets?
- Did you conduct (or commission) research?
- Did you develop an angle with a high likelihood of generating a meeting with a client or prospective client?
- Did you set and conduct the meeting?
- What next steps were identified and by which date did you agree they would be completed?

The tracking and reporting of these steps are known in the sales profession as a pipeline. Naturally, all lawyers will bristle at the prospect of having to report. Rest assured that every salesperson in the world has the same reaction to tracking and reporting. Accept it for what it is: a necessary part of the revenue-generation enterprise. And consider this. The information in a pipeline is a strategic asset of the firm, and managing partners are obligated to protect and zealously oversee this asset by insisting that accurate pipeline information be produced. (For more on this topic, see our blog [Creating and Managing a Sales Pipeline Report – LawVision.](#))

Further, managing partners must summon the discipline to, themselves, regularly study and understand their team's pipeline and take the leadership actions that it requires. The most important of these actions is simply noticing what's going on at the sales front, and letting team members know that their actions (or lack of actions) are being observed by a respected leadership figure.

When the pipeline report indicates that a team member is succeeding at taking each step and completing it on time, a managing partner can make sure to issue accolades (privately or in public if that is better suited to a particular team member) that will motivate the team member to keep going.

When the pipeline report shows a team member is lagging, the managing partner can have a conversation intended not to castigate but to find ways to help the struggling team member put things back on a positive trajectory.

When viewed as a series of sequential steps with binary outcomes, the role of sales manager becomes, well, manageable, even for busy lawyer-leaders. And at law firms, just as in the rest of the commercial world, pipelines that are carefully attended to by enlightened sales managers produce results.

At LawVision we offer advice to partner-leaders who want supplemental help in designing, implementing, and operating sales processes and pipelines. For more information, contact Steve Bell ([sbell@lawvision.com](mailto:sbell@lawvision.com)) or Silvia Coulter ([scoulter@lawvision.com](mailto:scoulter@lawvision.com)).