How to Install a Sales Process at Your Firm

By Steven M. Bell on February 6, 2024

If your firm has a client, it has a sales process. After all, somehow, a buyer of legal services became aware of your firm and expressed interest. When a specific need arose, somehow the buyer thought to reach out to your firm, consider its skills and offerings, decided to proceed and engage the firm, monitored the work, evaluated the results, and – if things went well – worked to build out the relationship with additional assignments.

We've written many times* about ways to craft a sales process. In a nutshell, we have suggested finding shining examples of the acquisition of new clients and the expansion of work at existing ones, then reverse engineering the steps that led to success.

We've also written many times about reasons to do so. In another nutshell, tasks become easier and results more profound when all parts of the firm adhere to a well-understood and sequential set of client development tasks, responsibilities, handoffs, and deadlines.

If, hopefully, you have become convinced that creating and using a sales process would be beneficial, one additional task needs attention: putting the process in place and ensuring it gets utilized. That may be the most difficult aspect of a sales process at law firms.

Who among us has not prominently launched a promising new initiative to great fanfare, only to watch it die a thousand (or however many lawyers your firm has) deaths? Far better to use a stealth approach: Build a sales process from the ground up, starting small with pilot programs, generating interest by producing results, relying on word of mouth, and institutionalizing it steadily over a long period of time.

Below are some ways to build that stealth program.

Start with Your Team. Make sure everyone in the client development organization (and closely related departments such as Finance, IT, or Information Services) understands the overall process and each step with it…from generating awareness to research to generating leads to following up to pitching and proposing to expanding engagements. All on the team should understand their own specific roles and responsibilities as well as the roles and responsibilities of other team members. They should know how to react when a request for support arrives, who on the team is assigned to handle each task, how to put the request into play, and how to record the steps taken in a centralized document or system.

Create a Playbook. It's good practice to document the items described in the paragraph above as a reference guide for the client development team and for the lawyers who will be asking for support. Not that a playbook will be studied in advance but, without question, situations will arise where having a playbook will come in handy.

Teach. When a lawyer makes a request of the client development team, use it as a soft teaching moment. If, for instance, a lawyer requests a pitch deck, the client development professional receiving the request might refer gently to the sales process as they respond with words like this: "Congratulations on this opportunity! I can see that our sales process has been effective in identifying the target, opening the door, getting the meeting, and identifying an opportunity. Next steps in the process are making sure you prepare, rehearse, and deliver a great presentation, and that you ask for the business.

We're ready to help you with that!"

Seek Firm Leadership Oversight. Actively ask firm leadership to follow the action. It's not likely that partners who lead practice groups or industry teams will be **expert** in your firm's sales process, but they should at least know the steps that comprise that process. Doing so puts these leaders in a strong position to help instill a process culture by asking lawyers who report to them to provide information that aligns with the sales process. The leader might say to a direct report lawyer: "Let's schedule 15 minutes to chat about how you're doing with your business development efforts. I'd really like to hear which step you're on with prospective clients and existing clients so I can provide help where needed."

Lawyer Orientation. Into the firm's lawyer orientation program, build in a description of the firm's sales process. This will be the first place that they learn about its existence. Hopefully, over time, using the techniques suggested above and ones that you develop yourself, these lawyers will learn how to lean into the sales process during their tenure at your firm.

These suggestions are more than theory. Even though at this juncture very few law firms have institutionalized sales processes, we have witnessed success at professional services firms beyond the legal vertical. Several years ago, LawVision Co-Founder and Principal Jim Cranston and I were sales directors at PwC, which was, at the time, just beginning its adoption and implementation of a sales process; Today it is vibrant and widely adopted. The firm selected the Miller-Heiman process and launched a strong ground game to help achieve buy-in and reap the benefits. It was a creaky start. Gradually, through continual low-key advocacy, the sales process began to gain ground. After a few months, we began to hear 'water cooler conversations' among partners such as: "Is that company you talked about a prospect yet or is it still a suspect? Where is it in the sales funnel? Have you completed the Blue Sheet™ yet?"**

Put the sales process into writing. Make sure firm leadership understands it and stands behind it. Educate your team. Introduce it gently, steadily, and widely, using teachable moments. Be consistent and persistent. You'll get there. Don't stop before the revenue miracle occurs.

Professionals in LawVision's Business Development, Sales & Growth Practice have developed successful processes for sales departments at large companies as well as for leading-edge law firms. If you are interested in learning more, please contact **Steve Bell** {sbell@lawvision.com | 202.421.5988}.

**Previous blogs on our sales process advocacy include:*

- 7 Reasons to Design a Law Firm Sales Process [Dec 2023]
- Law-Firm Sales Trends in This Post-Covid Moment – Part 2 [Apr 2022]
- Law-Firm Sales Trends in This Post-Covid Moment – Part 3 [May 2022]

***The Blue Sheet™ is a Miller-Heiman tool used to analyze opportunities, map relationships, and plan next-steps in the sales process.*