

Law Firm Business Development: Client Teams & Strategic Account Management (SAM)

By [LawVision](#) on March 12, 2015

During my days at Ernst & Young, I was a member of the leadership team that rolled-out the firm's Client Team program. To say that this change ruffled a few feathers is an incredible understatement. However, as time passed, the Ernst & Young partners began to realize how valuable this level of client focus was for improving client communication, which resulted in deepening and broadening relationships, improving client satisfaction, and, ultimately, increasing revenue. The Client Team program flourished because the clients responded to it so positively.

Always focused on continuous process improvement, the next natural step in the relationship development evolutionary cycle was to deploy a Strategic Account Management (SAM) program. Because of our success with Client Teams, the Ernst & Young partners met the SAM program with measurably less angst.

Although we are seeing more law firms launching effective Client Team programs, which is encouraging, very few have adopted strategic account management as a way to separate themselves from the competition.

The distinction that I draw between Client Teams and SAM, in simple terms, is that Client Teams typically;

- Have a narrow strategic focus on creating and capturing specific opportunities
- Focus on the short-term opportunities
- Are comprised of smaller teams that are formed ad hoc to win opportunities
- Success measures are internally focused (e.g., revenue, volume, etc.)
- Team meetings are infrequent, informal, and lack accountability

Whereas SAM programs typically;

- Take a broader focus on creating value for the client over and above specific opportunities
- Focus on the longer-term, mutually beneficial relationship as a business partner
- Are strategically built with cross-disciplinary professionals who have an understanding of the client's business and respective industry
- Externally focused (e.g., value created for account) as much as internal
- Team meetings are held on a routine basis, have a formal agenda, and team members are held accountable

Many law firms state that they have a Client Team program, but, in many cases, the program doesn't even meet the basic minimum Client Team criteria above. There are a few firms, however, that have realized, much like my Ernst & Young partners years ago, how valuable a Client Team program can be. Some of these firms are even beginning to move along the evolutionary pathway to creating a formal SAM program.

Some questions you may want to consider: Where is your firm on this evolutionary scale? Where do you think your primary competitors are on this scale? What would your clients think about your firm applying SAM fundamentals to their relationship with you? How might your clients benefit by your firm taking a more strategic approach to managing the relationship?