

Want to Land the Next Big Client at Your Firm? Understand Buyer Roles

By [LawVision](#) on February 27, 2015

Business development is most effective one-on-one and focused on building key relationships but big clients usually present themselves in the form of complex organizations containing many different potential relationships. Various “buyer roles” are spread throughout an organization, sometimes organically and sometimes by formal assignment. Understanding buyer roles and how to deal with each role will help you navigate a complex organization and build trusting relationships with key players.

Use the chart below to help you navigate all key buyer roles when working on institutional business development.

Legal Services Key Buyer Roles

Roles	Description	Approach
Decision Maker	The person who ultimately makes the decision. Holds the formal authority to select counsel and approves all or any part of the buying decision.	Your ultimate objective is to identify this person and convince them to agree to work with you. You may be able to use the other roles to get you to this person. Awareness activities like speaking, writing and joining are done with this person in mind as the target audience.
Financial Decision Maker	Controls the funds necessary to hire you and is designated as the person who can make the decision to spend those funds. Focus will be on bottom line results and ROI. This person can rarely say yes, but can usually say no. Many times the decision maker and financial decision maker are the same person. Often a CFO, Financial Director,	Identify – you must know who this person is. Connect – make sure this person understands your value proposition - the benefit and ROI of hiring you. This may be done by connecting directly or, if appropriate via a prepared coach. Once you have made contact, don't stop communicating. Get this person the information they ask for.
Technical Decision Maker	Weights in on how the hire will affect current systems. Could be a clerk, billing expert, CTO or anyone else who is tasked with making sure a new system will work with the current systems and frameworks, technical or otherwise.	Identify this person and enlist them to help you understand what obstacles need to be overcome in order to make sure your solution and your firm's systems can work well with whatever framework is currently in place. Think billing, staffing, communications, technology, geography and so forth.
Influencer	Can't make the decision but has influence on the decision maker. Two kinds: 1. Cheerleader – positive influence 2. Naysayer – negative influence	Identify who will be a positive influence and who will be a negative influence. Select a cheerleader to develop as your champion Naysayers- three strategies: Convince Corral or Control Convince – win them over to be cheerleaders or at least to be neutral by articulating your value proposition and the benefits of working with you and your firm. This could include your personal brand. Corral – Help others to see that the opinion of the naysayer is not relevant to the discussion either because they have little authority and credibility or because their objections aren't relevant. Control – Find cheerleaders with more power or authority in the organization who disagree with the naysayer and are willing to communicate that or become your champion.
Champion	Can't make the final decision but can give you advice on who to talk to, selection criteria and who holds real power. May not necessarily have authority but is usually also an influencer. The best champions want you hired and have influence and credibility inside their organization. They sometimes present themselves to you naturally but usually they need to be found, convinced and trained as champions.	Find – identify people who are positive about having you work with their organization Understand their motivation – find out why having you work with them is a "win" for them Build credibility – Show how helping you is advantageous to them and deliver on that Involve in process – enlist them to be a larger part of the process, use them to get information, make suggestions and be evangelists for you within the organization Communicate – keep them in the loop on key decisions and milestones Reward their risk – commend them in front of superiors, help them with their career, make them happy they helped.
Gatekeeper	This person controls information or access or both, to decision makers and influencers. Could be a secretary or an executive director or other lawyer	Win this person over early on especially if the person has little power besides the gatekeeper role – secretary, administrative assistant etc. If the person does have authority and is also a financial decision maker or influencer, acknowledge that power and convince them of the benefits of working with you and your firm
Consumer	Does the bulk of the work with outside counsel, will become the main contact and direct work. May be able to weigh in on how your services will help with work that needs to be done.	Lead with your personal brand. Ask yourself: Does this person like you? Will this person enjoy working with you and your team? Will working with us help this person advance in their organization?