THE NEW ELLIS GROUP

Monday Monday

Connecting the Dots with Karen Kaplowitz

Helping you create and reinforce the habits of successful career building,
gleaned from my work as a business development strategist, trainer and coach

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Pitch Perfect. There are many situations in which a “sales pitch” is not the best approach (read more about that here) But if a client invites you to make a sales pitch or presentation, or one of your partners has arranged a pitch and asked you to join a pitch team, here are some ideas on using the situation to best advantage:

- Plan the meeting as an interactive discussion, not a one-sided presentation.
- Make sure the whole team understands that a dialogue, not a lecture, is the objective.
- Let clients know beforehand that you expect to listen and learn from them about their needs, so your recommendations will address their specific situation.
- Do your homework in advance about the kinds of legal challenges the clients face. Know who has represented them in the past and the kinds of results they have achieved.
- If possible, ask your contacts for insight about the client’s concerns about their legal issues or current counsel that led them to agree to meet with your firm.
- Be prepared to discuss the specific experience your firm has on the most serious problems facing the prospect and the relevant results you have achieved for other clients.
- Be ready to ask probing questions in the course of the pitch meeting on the extent of risk posed to the client in areas on which you can be helpful. For example, how many lawsuits are they facing? What is the extent of the exposure from these matters? What has been previous counsel’s success rate? How will their business be affected if they are not successful?
- Plan possible action steps to take at the end of the pitch such as a follow on meeting, a CLE program, an evaluation of some program or problem, an invitation, or another way to continue building the relationship.

Tie your pitch to the specific concerns of prospective clients. It is the rare group which is interested in hearing the whole array of services your firm might perform for them. Giving a great presentation that is not aligned with a client’s problems is likely to miss the mark.

Example: A new lateral partner asked her practice group leader to help her arrange a pitch for a longtime client. The lateral had asked the client’s general counsel to allow her to bring in a team from her new firm to meet the general counsel, the litigation head and several senior lawyers in the law department. The lateral explained to her practice group leader that she wanted to expose the client to some of the firm’s capabilities which her former firm did not have. She described the specific work that she hoped to obtain. When the lateral reviewed with the general counsel who she planned to bring and why, the general counsel said that the company was very happy with existing counsel in one area but asked that she bring lawyers in another area in which they were already considering changing counsel. At the last minute, the general counsel called the lateral and said that he had an emergency board meeting and could not attend the pitch. He offered her a choice of going forward without him or rescheduling. Since the lateral had arranged for several people in her firm to travel a distance for the meeting, she suggested that they go forward and use the meeting to pin down some areas in which her new firm could be helpful and then to arrange a meeting between the general counsel and just those lawyers.

The goal of every pitch is insure that clients realize your understanding of their specific concerns and how your firm’s capabilities are the best recommendations for handling their situation. Describing your firm’s capabilities without a specific context has much less probability of success.

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