



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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Business Development Is Not a Numbers Game. Many firms are demanding that lawyers commit to more business development activities, suggesting guidelines, like so many phone calls or lunches per week or month, and asking for reports that the numbers have been met. Encouraging lawyers to connect regularly with clients and prospective clients is good but professional services business development is not a numbers game or confined to special purpose “sales calls.” Successful business development requires consistent behaviors which result in your staying connected to clients often enough and closely enough to uncover what they need that your firm can provide and to be top of mind when problems arise. Occasional lunches or special purpose “sales calls” may be appropriate but do not substitute for leveraging other, more regular contacts for the purpose of staying looped into opportunities as they become available. Consider incorporating these strategies into your daily routine:

- Before calling or meeting with clients on current matters, check online and with colleagues so you are prepared to probe about new developments that have not matured into legal work yet.
- When writing articles or preparing for speeches, contact clients or prospects for their insights and consider inviting them to co-author the article or participate.
- Keep current on clients and prospects through Google alerts or other tools and touch base with people when you see relevant information.
- Send your clients personal notes with client alerts or relevant new developments.
- Be mindful of your clients’ time constraints before proposing lunch or social activities which are designed for business development purposes.
- Use every possible occasion to create contact with clients or valuable prospects to query about new problems.
- Prioritize clients and prospects and stay in touch with the most promising group of people. Quality not quantity counts most.

Example: A new partner has been encouraged to generate her own work, from former clients and new sources. First, she creates a list of clients for whom she helped obtain good results. Then she prioritizes that list based on which clients she was closest to, which clients have client relationship partners who are not territorial, and which clients she expects to generate the most work. She then coordinates her plans with the client relationship partners so they don’t duplicate their efforts or burden the clients. She looks for opportunities to connect with the people on her list, including occasions relating to ongoing work and other events. She invites clients to relevant CLE programs and attends any bar or business meetings in which her targeted clients participate. She makes a secondary list of promising new people with whom she wants to build relationships and looks regularly for ways to connect with them, occasionally proposing lunch. When asked about her “numbers” she has a lot of quality interactions to report.

Are you so consumed with demands that you set up business development activities that you are losing sight of the *daily* opportunities for meaningful probing of clients’ and prospects’ unmet legal needs? Are you willing to focus on quality interactions rather than just meeting your “numbers”?