



## Who's on Your Top 40 List?

He had a reputation for weird marketing ideas, and my brief experience with him confirmed my initial reservations. Once, he burst – as far as a middle-aged tax attorney can burst – into my office to pitch a grandiose, high-cost, time-intensive marketing scheme. It took me a week to talk him out of it.

Either because or in spite of his non-traditional ideas, he was the top rainmaker in the firm, one of the highest compensated lawyers. He was a tax attorney that specialized in helping individuals get out of sticky state tax situations. Some of the wealthiest people on the planet called him for help. But he was not charismatic. His attention to detail, lock-tight memory and creative approach to marketing and the law set him apart from others.

I was a new marketing director and found myself visiting our Manhattan office along with Mr. Tax Attorney. We dined together in a small, dark Irish pub down the street from our office. I asked him his secret to developing new business. Here is his story:

“When I was a young associate – maybe my second or third year – I made a list of people I thought someday would be successful, and consequently, need legal assistance in some way. The people on the list came from a variety of sources – college acquaintances, family friends, and friends of friends. Some people on the list I didn’t know yet, but wanted to meet. Most of them were within five or ten years of my age. All were promising in some way, but most had not yet ‘made it big’. My first list had 40 people on it.

“My goal was to develop a relationship with each person so that when he or she needed a lawyer, I would be the first person they called. If it was a tax matter, that would be great and I’d have a new client. If not, I’d be able to refer them to someone in the firm; then I’d develop a reputation as being an internal referral source. I’d later seek reciprocal referrals and introductions from those I referred to.

“I intentionally built relationships with my group of 40. I took them out to dinner or lunch, and to sporting or cultural events, depending on their interest. Sometimes I enlisted my wife or kids if I knew that they had something in common with my guests. As I got to know these 40 better, I kept track of their interests. One accountant on the list, who eventually became the State Tax Commissioner, had a penchant for shopping for antique firearms. I have no such fascination with guns, but he did. So, every autumn he and his wife and me and mine would meet up for a day’s drive through the country going from one antique store to another shopping for guns.

“Over time, the list grew from 40 to more than a hundred; my notes on their interests, family background and professional accomplishments grew too. I found I had an uncanny ability to spot potential, because many, not all, of my prospects developed into successful – and wealthy – business leaders, government officials and referral sources. Many have become good friends along the way, not

to mention clients. Most of my clients today were either on my list of 40, were referred from them, or came from people I met through that initial list.”

At this point he paused to tell me about some of his successful clients. One of his clients was so pleased with a tax hearing savings in the six figures that he sent Mrs. Tax Attorney a \$5,000 watch. Mr. Tax Attorney refused it, along with a letter indicating that a cash bonus paid to the firm of around 10% of the total tax savings would not be unusual in cases like this. He received his bonus.

While he may have had some odd ideas on marketing, his approach to business development was spot-on. What did I learn from Mr. Tax Attorney?

- Relationships are the key to success. People hire people they trust, and the only path to trust is through relationships.
- Write down your plan to develop relationships and work your plan. Some relationships take years to develop into work or referrals.
- Consider the interests of others (like antique guns) before yours.
- Make it personal. Include spouses, family members and other friends if it helps you bond.
- Constantly pursue introductions to expand your network. Make your network real – not just virtual – through face-to-face encounters that are positive and memorable.
- Always look for a way to help others, even if it doesn’t immediately benefit you. Believe in karma.

So, who's on your top 40 hit list? What are you doing today to build a real, personal, professional network?

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Mark Beese is President of Leadership for Lawyers, a consultancy aimed at helping lawyers and other professionals become better business developers and leaders. This article first appeared in the online journal, Originate ([www.pbdi.org](http://www.pbdi.org)). Mark blogs at [www.leadershipforlawyers.typepad.com](http://www.leadershipforlawyers.typepad.com). Web: [www.leadershipforlawyers.com](http://www.leadershipforlawyers.com) email: [mark@leadershipforlawyers.com](mailto:mark@leadershipforlawyers.com)