Eight Ways Staff Can Participate in Business Development

While the burden of business development falls primarily on attorneys, staff members such as secretaries, administrative assistants, paralegals, technologists, librarians and directors can and should make significant contributions to the firm's business development efforts. Here are eight ways staff can make a difference.

1. **Provide remarkable client service:** For many clients, an attorney's secretary or assistant is their lifeline to the firm. Attorneys rely on staff to help them be responsive to phone messages and email while they are busy with cases and deals.

   Staff members, especially assistants, need to take the time to get to know their clients. Have your attorney introduce you in person. Get to know the client's voice when they call. Do some research on their business and the details of the matter. Understand what is at stake for the client professionally and personally. Learn their communication styles and preferences. Develop a relationship with the client's administrative assistant and other members of their team (especially the accounts payable folks).

   Remarkable client service is defined differently by each client. Remarkable client service will open the doors to new and interesting work, and retain profitable clients. Remarkable client service will drive referrals and word of mouth advertising.

   Look for ways to WOW your clients in an individual and person way.

2. **Create a Verbal Business Card (VBC):** A verbal business card is an effective way to introduce your firm to other people. It is often used in social and professional networking situations. Some people call it an elevator speech.

   How would you answer these questions at a cocktail party? "So, where do you work? What do you do?"

   Many of us might answer in lawyerese, "I'm a litigation support specialist for a PI firm that handles med-mal cases."

   What????

   A VBC identifies whom you serve (target market), how you help them (add value) and what services you or the firm provide. It might be phrased in the following format,

   I/We help (target market) to (value proposition) through or by (services).

For example,

I work for a law firm that helps land owners make money by developing underutilized properties. They rely on us to handle all of the legal and regulatory details so that they can focus on the business.

A good VBC is intriguing. It invites questions. You should be prepared to communicate:

- The firm's value proposition, which is how you are helpful or valuable to your clients. Why are you worth "twice the fees" to your clients?

- Three points of difference: What makes your firm different from the others? Why is that important to your clients?

- Three stories of success: How have you or your firm made a client successful? What is the proof of your value proposition?

Once you prepare your VBC with points of difference and success stories, you will be surprised how often you will use it. You will also be surprised by how well people recall you and your firm in the future.

3. **Be Alert to Opportunities**: As you interact with clients and potential clients, network in the community and talk with friends, *listen* for opportunities for your firm.

   Be aware of 'trigger events' that might lead a company or client to consider changing lawyers or law firms. Perhaps you may hear her/him expressing dissatisfaction over another firm's work or responsiveness. It may be a discussion of expansion, a merger, or of possible litigation. Perhaps they need legal help in an area that your firm is not currently providing service. You can be the eyes and ears of the firm to identify opportunities among existing and potential clients.

   Be prepared to ask questions and offer to introduce the client/prospect to an attorney in the firm. Your role is best seen as an internal referral source rather than someone soliciting business. For you to be effective, you must understand the practice areas and industries your firm serves. Find the right attorney who is the best match with the potential client and make the introduction.

4. **Help attorneys manage their contacts**: Working one's network to develop relationships is critical to business development. Many attorneys have a hard time keeping up with their contact information, which can hinder one's business development efforts. Administrative assistants can help attorneys organize and update their contacts. Deleting contacts that have passed on, updating information on people who have changed jobs, completing missing physical addresses or emails (or websites, blogs, twitter, etc…) can be very helpful.

Attorneys and firms should also be maintaining targeted e-mail lists so that they can communicate important and timely information to narrowly defined groups of clients and prospects on a moment's notice. You can help your attorneys keep these lists up to date and assure that key clients, prospects, VIPs, thought leaders, media contacts and referral sources are on these lists.

Administrative staff can also help attorneys be more effective in social networking. When admin staff have access to an attorney's contacts (either in Outlook or through a CRM system), they can work on their behalf to 'friend' contacts in LinkedIn or Martindale Hubbell Connected.

5. **Become a part-time competitive intelligence analyst**: The corporate world is rapidly changing and attorneys need to keep up with the latest news of our clients' and prospects' business and industry. Admin staff can serve as intelligence gatherers and synthesizers, providing relevant information to attorneys and practice/industry groups, including:

    a. Setting up news alerts, like Google Alerts, for key clients and prospects, reviewing daily alerts and providing only those stories/links that are relevant to the attorneys.

    b. Setting up litigation alerts, such as Thompson/Reuters or LexisNexis, reviewing daily and providing only those relevant cases to the attorneys.

    c. Receiving email newsletters, reviewing blogs and other online content via RSS feeds, culling out useless information, and providing a summary of relevant information to the attorney or group.

    Many firms circulate this information with industry groups via email lists or the firm's intranet. Some re-purpose the information and make it available to clients and prospects via email alerts or blogs.

    Staff can also learn basic competitive research techniques, such as profiling a company or individual prior to a business development meeting. Developing a basic research protocol of visiting web sites such as LinkedIn, ZoomInfo, Martindale Hubbell, Legal OnRamp, Hoovers, Google News, company and industry web sites can help an attorney as s/he prepares for a meeting.

6. **Business Development Tracking**: One of the keys to successful business development is having discipline in planning and tracking your BD activity. Staff can help attorneys develop a lead/prospect tracking system. A simple system consists of a spreadsheet with the following fields: Name, Company, Title, Needs/Wants, Opportunities and Next Steps. The staff person can help attorneys keep the spreadsheet up to date, and assist with follow up and implementation.

    Seasoned rainmakers also develop a monthly action list, outlining the people s/he will call, email, set up appointments an lunches and entertainment. Admin staff can help manage the monthly action list and assist with scheduling appointments. A strong attorney/admin team focused on setting up meetings is hard to beat.

7. **Relationship Management**: This is related to a number of points above, but worth mentioning as a separate concept. Admin staff can help attorneys build stronger relationships with clients by focusing on the details, such as:

    a. Remembering client birthdays and sending a card or small gift.

    b. Managing a client/matter online calendar and keeping the attorney and/or client team on track.

    c. Participating in client team meetings so that staff is aware of pressure points, potential land mines and critical success factors of the project.

    d. Generally making the attorneys, client team and firm look good to the client.

8. **Marketing Materials:** Staff members are well positioned to create and assemble general marketing materials that attorneys can use when meeting with potential clients, speaking at industry events or hosting events. Every attorney should have an updated biography, practice group description, a list of relevant projects/cases and relevant authored articles. Keeping the web site up to date with relevant articles, updated bios, upcoming events, press releases, speaking gigs, etc… is also very important.

Staff can, and should, play an important role in a firm's business development efforts. Marketing a law firm, as in any business, is a never-ending task. The most successful firms have strong attorney-staff teams that together are marketing machines.

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