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LEGAL MARKETING

Are You Falling Down When It's Time to Follow Up?

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Special to the Legal

Of all the marketing initiatives that are critical for lawyers to commit to, the most basic and seemingly obvious is the “sin” of omission — the failure to follow up.

We have worked with lawyers who have spent innumerable hours and thousands of dollars chasing after new clients and prospects but have largely been unsuccessful in retentions because of a gap in their business development process: following up.

Do any of these examples ring familiar:

- A very sociable corporate partner attended numerous networking events a month, engaged easily with others attending, handed out business cards, but rarely received calls or new clients as a result. Because of her frustration, she curtailed her networking activities and short-circuited this important business development action step.

- A labor and employment boutique law firm hosted an annual educational program that featured leaders in the field and attracted high-level CFOs and HR professionals to the event. They received high marks on all aspects of the events but few, if any, calls from prospects. Members of the disappointed team deemed the effort a failure and asserted that seminars don't work to get new clients.



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- The managing partner of a firm received a referral from a trusted client who was searching for new counsel in this attorney's “sweet spot” of legal practice. The partner attended a prospective client interview in which he thoroughly espoused all the ways his firm could save this prospect's firm significant amounts of money, given the specific legal issues at stake. Day after day, the managing partner didn't receive a call or e-mail to discuss retention and getting started. “Why did this prospect waste his time?” was the only thought the frustrated managing partner ruminated upon.

While each of these examples highlights effective marketing initiatives — targeted networking, educational seminars, in-person

client interviews — they all share the same flaw: lack of follow up and planning.

A FOLLOW-UP REDO

As part of the business development process, lawyers must recognize and integrate into their “SOP” (standard operating procedures) action steps that extend beyond “showing up.” By leaving out the planning and following-up components, lawyers are short-circuiting the process, leaving money on the table and becoming more cynical over whether marketing actually “works,” however one defines that.

To examine the first example above, the more effective steps of action would have been:

- Request an event registration list so that the lawyer could have identified

several targeted folks “of interest” to seek out and engage. It would be very effective to gather some background information (a quick Google search) about the target companies to make conversations more meaningful.

- With a little research in hand, the lawyer arrives to the networking event with a plan of

whom she plans to engage, whom she intends to connect and how she will spend the next several hours. This is work, not an opportunity to have a few free drinks and yuk it up with firm colleagues she sees every day.

- Practicing effective networking techniques, this sociable lawyer knows that it is essential to be more “interested” than “interesting,” so she exercises active listening techniques by asking open-ended questions of her networking partners to learn more about their businesses and challenges. From this, she receives a number of “high impact” business cards, which she will use to follow up after the event.

The steps described above take very little investment of time, but will yield a very different experience, which can lead directly to a new client re-

tention or, at minimum, a new business connection for referrals.

Contrasting the legal profession with corporate America in developing new business, one only has to examine the models of each. Corporate America devotes billions of dollars

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every year to “sales and marketing” — to the process of cultivating and nurturing new prospect relationships leading to a “sale.” The typical sales process may involve innumerable “follow-ups” before a sale is actually consummated.

The legal profession historically has played a reactive role wherein new clients (new sales) seek out the law firm to engage it. It is unwise in these ultracompetitive times to

continue this practice. If lawyers are the ones seeking new business or even additional work from existing clients, the obligation falls upon them to pursue it and continue to make contacts until they are directed otherwise. (Remember, studies show that it takes at least 7-10 “touches” to become top-of-mind with clients and prospects.)

DIFFERENT FACES OF FOLLOW-UP

Though follow-up can take many different approaches, the overall non-negotiable component involves any action step that provokes the other party — existing client, prospect, etc. — to want to continue contact with you.

You are focused on cultivating and nurturing a relationship that will ultimately be mutually beneficial and add value.

A few examples of effective follow-up include:

- Brief thank you e-mails following an event (networking, educational programs or entertainment).

- Handwritten notes of congratulations for personal or business accomplishments.

- Links to a relevant news article from which your contact would benefit.

- Personal visits to a client's worksite to deliver a work product.

- Invitations to social events,

professional organization programs or business workshops.

The more lawyers engage in marketing initiatives, the most important task to remember is to plan appropriately before taking any action what the follow-up steps will be, who will take them and in what time frame. Treat this component of the business development process as you would a client obligation and coordinate your calendar with all parties involved. It is in this step that the revenue will be found, the meaningful business relationships will be established and robust practices will be built. •