Law Firm Marketing

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The 'F' factor – follow-up

It has been my experience thus far working with lawyers that when it comes to business development, and where good first steps have been taken, for example giving presentations or networking at strategic events, if the ball is going to drop, it's in the follow-up.

The following steps can be used for current clients to strengthen relationships as well as developing new relationships from prospects.

Within 24 hours

The first rule of follow up is to do it within 24 hours (wherever possible) of meeting with someone. This helps you to stay top of mind. The longer you let it go, the less important it seems. Simply send a brief e-mail to your contact suggesting a time to meet to further discuss a topic or idea that you chatted about when you first met. Keep this simple and not about you. If there seems to be enough interest to move things forward suggest a reason to meet in person and skip the next steps.

Start with a casual meeting

Have an informal meeting to start. Ask questions and get to know this person on a personal as well as professional level. Look to find common interests or hobbies. Find out a little something about what makes this person tick. At this point you are filtering. You are merely trying to determine whether this person is of interest in a business sense and whether you should take the time to really get to know them.

We like to refer to this approach as a "mini" discovery. Following this meeting you should know enough about them to determine how to proceed. In other words, is there a reason to move forward?

Ask for the formal meeting

If there is a reason to move forward, ask to set up a more formal meeting at their place of work. Depending on the situation, you may even ask to get a tour of their facilities. The purpose of this meeting would be to go deeper to find specific needs and challenges. And make it clear before the meeting the reason you are meeting; to get as much understanding of them, their role, challenges and goals. You should prepare a list of questions ahead of time and also remain nimble in this meeting to follow their lead. The outcome you desire here is to get the big picture on this person so you would understand how you can help them.

As appeared in the October 22 2010 issue of The Lawyers Weekly

Keeping in touch along the way

These steps may not always fall into place so here are a few suggestions. Stay in touch with contacts and stay top of mind by sending them valuable information. Keep your eyes open for articles or bulletins that would be of interest and send them to them periodically. If you see an event that might be of interest to them, point it out. Look for ways to stay top of mind and demonstrate your interest in them while providing some value.

Confirm needs

When you have had the formal meeting, type out your notes and e-mail them to your contact for confirmation. Give them the opportunity to correct or clarify your points until the two of you come to a consensus. Now that you have confirmed their needs and they agree with you there is only one last step to go…

Offer solutions

Now you can offer solutions based on their exact needs. So there is no “asking” for business; no pushing, no pulling and no hard sell. You have taken the time to get to know them and their needs and you have found a way or ways to help them. This is a comfortable approach for you and your contacts.

The timeline

There is no defined timeline to follow. This series of steps will take different turns and can happen as fast as a couple of weeks or up to a couple of years. It will depend on what your prospects or contacts need and being at the right place at the right time.

Other considerations

If it seems that the person you are following up with is showing no interest, use the 3 strike rule. In other words, if you have sent them a combination of three e-mails or left voice messages and they are not responding, they are likely not interested or too busy to communicate with you at this point, let it go and move on to your next contact. And don’t take it personally.

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