

The new road to new business: a step-by-step approach



By Carolyn
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Whether you are a small practitioner or a large law firm, the days of resting on your founder's or rain-maker's laurels are over.

You know you are charged with tracking down new business opportunities at every turn — from formal

RFPs to tips from clients and friends about potential legal needs.

Even more daunting is the level of sophistication of new-business proposals. With lawyers teaming up with marketing professionals, the task of writing a response to an RFP takes on new proportions as firms try to make their proposals stand out.

Forging relationships

It's all about relationships. You may have a lead. You might need to craft a written response. But before you even begin writing, you need to forge a relationship with the prospective client. In fact, the relationship will far outweigh the written proposal every time.

Unless prohibited by RFP requirements, seek out a time to meet with or talk by phone to the prospective client to find out more about the organization and its needs, where the company is headed, if there are any hidden agendas, what are the greatest concerns, what keeps the president up at night?

Of course, any well-respecting attorney or marketing guru will do his homework before that info-gathering meeting. In today's world of instant access via the Internet, an hour or so of research will get you what you need to know.

Strategize

Once you have gained an understanding of the industry, the prospect's concerns and other relevant issues, the next step on the new road to new business is to strategize.

Determine your own key-selling-points for this piece of business and just how you will get this work.

If your firm has an expert in a special area, if you have a long-standing volunteer board relationship with a decision-

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maker, or if your firm just won a Supreme Court case on the issue at hand, use that key-selling-point as the strategic focus of your proposal, weaving it into your written document at every turn.

Another critical element of strategy is problem-solving. Let your prospective clients know how you can solve their problems. If you know service is an issue, pledge to be available and share your home phone or personal cell phone number. If you discover the primary contact is a bit "old school," select one of your more seasoned partners to lead the team.

Plan to highlight your key-selling-points throughout your written proposal.

Getting new clients is a long and winding road with many twists and turns. However, establishing a marketing-centric approach might make the road a little less bumpy.



Capitalize on references

If you want to show how you would be the best firm for a prospective client, take a step back. Let your clients and references do the talking. Make a call to a favorite client in a similar industry or for whom you handled a similar legal matter; ask the client to call — proactively — the prospect to sing your praises. Do the same for the go-to person who alerted you to this opportunity.

And, finally, include testimonials to bring life to your reference list. (Sometimes clients feel uncomfortable writing a testimonial, so the next time a client compliments you and the firm, ask if you could draft a testimonial based on the conversation for the client's review.)

Write a knock-your-socks-off proposal

The key to writing aggressive, memorable proposals is to understand the difference between features and benefits. It's not all about you. Sorry. In fact, it's not really about you at

all. If you have identified your key-selling-points, now is the time to show how they can actually help the prospective client.

For example, you may know your prospective client needs fast access to the court system in a variety of counties. You might be tempted to elaborate on your large, three-office law firm. Instead, consider turning your statement about the *features* of your firm into a statement of *benefits* for the prospective client. For example, you might say "our multi-office setting provides instant access to local courthouses throughout the region."

Once you've adopted the client-centric attitude, get rid of the fluff; it only dilutes your main message. Be sure to use the active voice and avoid legal-speak. We all know that people just don't read any more; we want our information concise and easy to understand.

Forget about fees

In the old days, the fee was the first thing the prospect sought in a written proposal. It might still be the first thing, but it is no longer the deciding factor.

While you can't price yourself out of the game, you can establish a relationship and offer problem-solving suggestions that supersede the issue of fee.

Delivery, follow-up, tracking

Nothing speaks louder about your commitment to a potential client than an in-person delivery of the written proposal. Be sure to call ahead to say you would like to stop by and hand-deliver the written proposal.

Of course, every new-business undertaking needs follow-up. Be sure to call if you don't hear anything; it will reinforce how much you want to be hired. Call if you don't get the work; you can always learn from un-

successful proposal situations. Call if you do get the work; ask why you were selected.

Then, take what you have learned and create a simple Excel spreadsheet that shows your wins and losses. Be sure to include: the people/partners involved, the type of legal experience required, the names of competing law firms who bid on the same work, from where the lead came, and why you were awarded — or not awarded — the work. Track your successes and learn from your losses.

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Consider year-round marketing activities that support the new-business process, including soft-skills training on networking and other business-building skills; individual marketing plans for partners and associates; and client satisfaction surveys to generate testimonials and referrals.

Then, hit the road.

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