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## **Strategies for Getting and Keeping Clients With Your Firm**

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When firms are disappointed that their "marketing" efforts fail to bring in new clients and new business, it's often because they don't understand the difference between marketing and sales.

According to Sally Schmidt, a consultant and pioneer of in-house law firm marketing, "marketing" provides a strategic umbrella for a host of activities, from planning and research, PR and other communications, and events to direct business development activities.

Marketing and sales are separate but intertwined functions. Marketing positions the firm and its lawyers in the minds of clients, prospective clients and referral sources. Business development develops relationships that lead directly to business for the firm.

Schmidt, author of "Business Development for Lawyers" (ALM 2006), fellow and member of the board of trustees of the College of Law Practice Management and president of Schmidt Marketing Inc., spoke to nearly 90 lawyers, marketing and business development staff and administrators at the recent Nov. 28 meeting of the Delaware Valley Law Firm Marketing Group. Schmidt stressed that sales and marketing are very different, and she offered insight and practical suggestions for implementation of each.

Schmidt used seminars as an example of a common marketing activity that is often criticized as a waste of time and money. It is a positioning activity that increases knowledge and awareness of the firm's lawyers and capability. It only becomes a business development, or sales, activity with the active engagement of the firm's lawyers.

Lawyers must understand their target audience of such an event, communicate with that audience ahead of time, mingle with the attendees (for example, there should be one firm lawyer/host for every 25 guests), survey their needs and follow up. Successful follow-up activities that often lead to new business include small group

roundtables, presentations at a client's office and continuing communications such as e-mails, telephone calls and personal notes. Schmidt characterized this as "moving from mass to one-on-one."

She urged the attendees to "think small" -- be focused and target a client's needs. Schmidt also reminded the group that of 10 prospects, only two or three will become clients. In today's competitive environment, business development efforts must capitalize on marketing positioning in order to bring new business in the door.

## **DEVELOPING BUSINESS**

Business development is gaining traction in law firms. A number of firms have hired a director of business development, "sales" personnel and business development managers who work with practice groups or offices. Firms also provide "sales" support functions. The support functions include the following:

- Client/prospect research and analysis;
- Assistance with proposal writing;
- Coaching and training;
- Developing databases;
- Conducting post-mortems after a presentation; and
- Identifying opportunities for the firm to pursue.

Schmidt also noted that creating client and prospective client teams, adjusting the compensation system to credit teams with success and sharing business development information through an intranet are important internal elements to successful business development.

Schmidt's company conducted the most recent (2005) law firm marketing salary survey. It found that in-house staff who listed "business development" as their primary function earned an average of \$7,500 more than "generalists."

## **FOLLOW UP RELENTLESSLY**

Schmidt encouraged everyone to emphasize strategy, client contact and business development. Marketers and business developers must therefore achieve the following:

- Learn the firm's clients and their industries;
- Analyze business trends;
- Avoid boilerplate in presentations;
- Understand law firm economics;
- Prepare useful information in summary format with recommendations for action;
- Learn how to make a good presentation;
- Be active in the community and professionally; and
- Be relentless with follow-up.

Additional information about Sally Schmidt's presentation is available on the [Delaware Valley Law Firm Marketing Group Web site](#).

Schmidt began her law firm marketing career in 1983 and was a founder and the first president of the group that

became the Legal Marketing Association. She now handles recruiting, training, planning, market research, client interviews and other consulting work for law firms in North America, Central America, Australia and New Zealand.

*Mary Beth Pratt is the founder of MBPratt Consulting.*