

Legal Business Development – Profiling and Communication

In a recent Business Development workshop we posed the question to our clients – who is your ideal client? The immediate response came back, ‘anything with – or without – a pulse!’

For many solicitors, this has been the case for many years. Any client with work to offer, and with the capacity to pay (or, indeed, for many firms even those who have a demonstrably poor payment history) would constitute an ideal client.

Successful Departments

However, the days of casting the marketing net so wide are gone. Reaching clients takes investment, and firms must focus that investment on their best prospects to achieve a sufficient return on what is effectively the partners’ capital.

Therefore, an important starting point is for all departments and teams to identify their ideal client. This will ideally be done at a team meeting or workshop, to get discussion going and get everyone on the same page.

Identification means more than ‘businesses in our area’ or ‘private clients’. In a B2B market it is important to know what market the client is in; the size of the company and turnover; location(s); and even corporate structure (who is the buyer, and with whom should contacts be nurtured?). Private clients can be profiled by age; wealth/income; occupation (at least in broad terms); location; and likely requirements.

Cross –Selling Legal Services

Different teams and departments will naturally have different ideal clients. However, in identifying the ideal client we not only get everyone pulling together in the same direction, but also maximise opportunities for cross-selling and referral within the firm. This is something that all fee earners (and non-fee earners, where appropriate) should be explicitly aware of and consciously seeking to pursue. The ideal client (especially in private client work, but also often in B2B too) will have a range of needs that different people within the firm can help with.

There are clearly no right or wrong answers – and different people within teams will also have different ideal clients. As long as this is recognised and is part of the Business Development strategy, this can serve to strengthen the portfolio. What is important is for the firm to be deploying its resources effectively – and client profiling forms a key part of this.

Consistent Communication

Having identified your ideal client type, the next step is to decide on the best methods of communication with those clients and prospects – and to understand the cost implications of the strategy.

As we have iterated many times before, the starting point should always be the data the firm already holds in its database. The database should contain all of the details relevant to profiling the client – including status (lead – qualified or unqualified – or current or past client), their current need, any potential future needs, and preferred method of communication. All contact should have been opted-in for.

First Things First – The Law Firm Database

If this data is not accurate and up to date, this provides an important task for someone in the support team. It may well be that fee earners will also need to gather the missing information in subsequent client meetings, and some aspects of the database (such as the will bank) may need extensive cleansing to ensure the integrity of the data.

Without doubt, the cheapest way to communicate with clients is via email. However, in some practice areas this is not always practical. Business clients are likely to appreciate email, and keep in touch campaigns such as newsletters should also be electronic. Others, such as elderly private clients, may prefer telephone or even personal meetings. Each communication has a cost attached – even with electronic communications, in terms of fee earner time. Law firms are very good at measuring time billed – but not always so good with the hidden costs often involved in Business Development.

Keeping in touch with clients, and especially with prospects, can also be effectively done using new social media methods. Again, this requires careful consideration. Business clients may well like to be kept up to date via LinkedIn. Some services, especially to individuals, can be effectively marketed through a Facebook page. Certain partners and fee earners can promote their personal profile through regular blogging. Twitter can also be a good way of reaching new clients, especially amongst the younger generation (although many professionals also see Twitter as a good way of keeping abreast of news in their markets).

The Costs – and Benefits – of Legal Business Development

As with all marketing channels, each should be subject to a rigorous cost-benefit approach. The marketing mix should involve a range of methods – traditional relationship management, married with online keep in touch campaigns, social media where appropriate, and possibly targeted advertising.

Ultimately, the measure of success should be the return on investment in any of these areas – and those that deliver sufficient levels of profitable work to the firm deserve further investment, while those that consistently underperform (as many traditional methods do) should be jettisoned.

This approach underpins the methods of developing business in our [Profitable Partnerships Programme](#), which helps fee earners to measurably and sustainably improve their billing capacity.

Please feel free to contact us for further advice.

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