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BUSINESS OF BRANDING

Your Logo Is Not Your Brand

By **Jeremy Hoders**

To me, your brand is an expression of your personality. Branding is the strategy, planning and maintenance work that goes into helping to form and develop the communication tools that will best express and communicate the personality of a brand. We all have loyalty to certain products or services, an emotional connection that makes us smile or reach into our pockets and pull out our wallets. In other words, a brand's "personality" is multifaceted and a product or service cannot rely on any one element of its brand to make a sale.

As a branding agency that develops branding strategies and communications tools like logo design, Web site creation, collateral, social media strategy and implementation, etc. for professional services firms, we find, all too often, that many firms still believe that their logo solely defines their brand.

We recently received an RFP for a "branding and marketing communications strategy." As we read through the well-written document, it became clear that there was no branding involved at all, yet the firm and its RFP repeatedly kept referring to its logo as its brand. This got me wondering. Where is the communication gap? Maybe it is a lack of education regarding the fundamentals of branding. Perhaps they got the idea from the Coca Colas, Nikes and

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The Anatomy of a Successful Business Development Coaching Program

*Part One of a Two-Part Article*By **Peter A. Johnson**

Editor's Note: Many firms are investing in business development training and coaching programs for their attorneys. The following two-part article describes some of the considerations firms should make in designing a successful program. Part One herein introduces coaching concepts and outlines recommendations for the program design. Part Two, which will appear in the March issue, reviews the training implementation, from determining coaching assignments to measuring program success.

A Lawyer's 1980s Flashback: The market is flush with clients. Marketing is limited to business cards, brochures and reprints. CMOs and Marketing

Directors don't exist in law firms. A "pitch" is about lawyers only — the client's needs never enter the equation. Active listening is something clients do — not their attorneys. To succeed, lawyers need only to produce an excellent legal product. Bringing in new business is not the *sine qua non* to becoming a partner.

Fast forward to today where lawyers confront a very different scenario: There is fierce competition among many more attorneys for far fewer clients. Sophisticated technology tracks every client's birthday, favorite sporting event and preferred wines. Social media makes it clear that there are just a few degrees of separation. Legal marketing professionals are highly specialized. Practice groups, key client teams and competitive intelligence have penetrated most law firms. Clients now differentiate law firms by using value propositions defined by them and not the attorney. Client loyalty can no longer be assumed. Becoming a partner is now more difficult and requires a proven track record of business development in addition to committing to bill an extraordinary number of hours.

The profession of law has transitioned into the business of lawyering. How do firms help their lawyers bridge the gap between the lack of business development training in law school and the changing performance standards which now place a premium on client development and retention? Firms acknowledge that investing in attorneys' business development education is important, but few initiate appropriate or effective programs. Without proper training and support, it is

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Coaching Program

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not surprising that lawyers are frustrated with their inability to develop business.

Firms recognize that providing sales, business development and coaching programs facilitated by experienced consultants is a positive step toward teaching attorneys how to develop business in individualized ways. The following are some important considerations to establishing a successful program.

ANATOMY OF A SUCCESSFUL COACHING PROGRAM

Having coached nearly 200 attorneys, I confirm that every coaching program is different and achieves varied levels of success. In my experience, “one-off” and “off-the-shelf” group trainings are not effective. That approach generally has a high rate of failure; without ongoing reinforcement most attorneys revert to “business as usual” within a relatively short period of time, and any business development enthusiasm and momentum created by the training is not sustained.

To be successful, a program should be tailored to each firm’s unique goals and cultures and to each attorney’s individual needs and personality. A successful training also requires ongoing firm commitment and involvement even after the formal program has ended. Such a coaching program takes time and effort, but the final outcome is always more desirable.

Some common components of successful programs are:

- **Research** — includes surveys, questionnaires, and discussions with firm leaders/management.
- **Business development workshop.**
- **One-on-one meetings** — the coach and the lawyer.
- **Individual coaching calls.**

BACKGROUND CRITERIA/

FIRM CONSIDERATIONS

Management Commitment — Leadership must reinforce the importance of business development

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coaching over the long term by remaining active in and committed to the program by regularly monitoring participants’ performance.

Role of the Adviser/Mentor — Mentors, advisers, and supervising partners are essential participants in the program. The consultant/coach should conduct phone “interviews” with the supervising partners/mentors with whom the program participants work most closely. Ask for their frank assessment of the business development strengths and weaknesses of the participant, as well as what they perceive as opportunities for improvement in business development activities and skills. The conversation provides insight about participant personality, business development “IQ” and specific goals. As the coaching progresses, the coach should check in with the adviser periodically to discuss attorney progress. Following the conclusion of the three-four months of coaching by the consultant, the advisers continue to work with their “advisees,” helping to ensure long-term success.

Associates — Associates must learn about business development early in their careers. Law schools do not teach these skills and firms cannot expect new partners to magically know how to bring in business on their first day. Third- or fourth-year associates should be introduced to basic skills training in building relationships, networking and client service.

Accountability — One of the most important “predictors” of a program’s success is the level of participant accountability required by the firm. Business development should be part of the attorney review and advancement process. People generally “do” what is measured and rewarded, and if the firm is rewarding billable hours only, is there any question where the attorneys’ focus will be? Business development efforts and successes must be a factor in compensation.

Length of the Program — We recommend that the firm extend the coaching period to those attorneys who may need additional training.

PROGRAM RESEARCH AND DESIGN

Client “Voices” Must Formulate the Program — Successful coaching programs are based in part on

understanding how clients choose lawyers and law firms. What do they like, what don’t they like, and how can the firm/attorney enhance the client relationship? After all, it is not what lawyers think that is important ... it is what clients think! Take the time to talk to firm clients and then use the information to develop a training/coaching curriculum that teaches activities, attitudes and skill sets which clients say are necessary to receive repeat work and unqualified referrals.

Pre-Workshop Coaching Survey

— Prior to determining the workshop agenda, we suggest designing a Web-based survey to gather information about the business development culture of the firm. We ask both closed-end (forced choice) and open-ended questions. The responses are anonymous and provide important information from which we determine the group’s business development “IQ” and develop an agenda that is specific to the needs of the group. For example, survey results from a group of attorneys in a coaching program indicated that the lawyers needed more information about the role of the marketing department. As a result, the workshop was designed to include a presentation by, and discussion with the marketing director, outlining the department’s specific roles and describing department resources.

Business Development Questionnaire

— In addition to the general Web-based survey, each participant should also complete a brief pre-training Business Development Questionnaire asking them: 1) what they want to learn; 2) what they believe to be any internal and external obstacles to business development; and 3) where they see their greatest opportunities for new business. The responses to the questionnaire help the attorney and the coach identify existing and potential referral sources, clients, and prospects and also provide information about the attorney’s unique communication style relevant to developing relationships. The information from the questionnaire also is used to determine the appropriate coaching assignments.

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The Anatomy of a Successful Business Development Coaching Program

Part Two of a Two-Part Article

By Peter A. Johnson

Editor's Note: Many firms are investing in business development training and coaching programs for their attorneys. The following is Part Two of a two-part article describing considerations firms should make in designing a successful program. Part One, which appeared in the February issue of MLF, introduced the coaching concept and rationale and outlined recommendations for the design of a coaching program. Part Two herein reviews the implementation of the training, from determining the appropriate coaching assignments to measuring success of the program.

GETTING STARTED

Coaching Assignments

One of the most important considerations in designing a training program is the matching of the coach to the attorney. An effective program requires coaches and attorneys to be matched based on criteria such as style, personality, area of practice and goals. In determining the assignment, we rely heavily on the adviser/mentor input, as well as the responses to the questionnaire. We have found that having multiple coaches increases the likelihood of a compatible "fit," which is imperative to a successful program. Clearly, coaching experience and personality are important considerations, and most firms report a greater acceptance among the participants of a coach who has practiced law. Conduct your due diligence to make sure the coach understands the firm's business develop-

ment culture, as well as each participant's business development strengths and weaknesses in relation to the expectations of the firm.

The Kick-off

A kick-off reception the night before the workshop sets the tone of the program and creates the opportunity for firms with attendees from multiple offices to gather and get reacquainted with one another. Integrating the marketing team and other advisers/management into the event shows a unified commitment to the program. If there have been previous coaching participants within the firm, be sure to include the "graduates" as well, so that they may serve as role models and sounding boards for the new class. Coaching clients have found the kick-off a great way to initiate internal marketing and cross selling.

The Workshop

When it comes to group trainings and workshops, "less is more." The pre-workshop research reveals what is most meaningful and important to the group, and the agenda is determined, in part, by survey results. The workshop addresses issues including motivation, time management and any perceived firm-related obstacles such as culture, compensation, teamwork and resources. Although the primary benefit of a coaching program is the "one-on-one" sessions and ongoing individual coaching phone calls, a half-day workshop nicely introduces the group to necessary business development concepts that serve as a foundation for the individual sessions.

One-on-One Meetings

Following the workshop, the coach should meet with each participant for about 90 minutes. The meeting provides the opportunity for the coach and attorney to get to know each other personally and professionally, and to start to develop the trust and rapport, which is integral to the coaching relationship. During this meeting, the coach and lawyer review the responses to the questionnaire and together, they start to craft the attorney's business development plan. At this meeting, the coach and attorney discuss the

coaching "contract," which requires accountability and commitment. The coach should make it clear that the attorney's success is directly proportionate to their commitment.

The Business Development Plan

After one-on-one meetings, each attorney is required to submit a three- to six-month business development action plan to the coach. These plans typically include long- and short-term objectives and specific activities designed to achieve those goals. Although each attorney identifies different activities, many of the goals and objectives are similar. For example, "getting known" may be an objective for several of the participants, but the activities to gain recognition are uniquely tailored to the individual. Over the course of coaching, activities are tracked and monitored and the plan reviewed and revised when appropriate.

The Coaching Calls

Most people develop skills principally by doing — performing the necessary tasks with supervision and feedback from a skilled coach. Just as lawyering skills are developed under the supervision of a seasoned lawyer, business development and selling skills are best developed in "real time" by working on real opportunities with the assistance of a coach during scheduled, individual telephone conferences which should take place at least every two weeks. The coaching sessions focus on developing specific strategies, step-by-step relationship building, and problem solving activities for each attorney. The lawyers are also encouraged to initiate unscheduled calls "as needed" when time-sensitive business development opportunities emerge and immediate action is required.

Tracking Activities

Participants should keep a detailed log of all business-development activities and share the log with

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Coaching Program

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their coach prior to each scheduled call. Use tracking forms to monitor activities and advances. The forms become a “follow-up” tool used to develop next steps with a particular contact.

MOVING FORWARD

The Transition

After three to four months of coaching, begin to transition participants from their outside coach to their advisers/mentors. The adviser now begins to take the place of the coach; he or she monitors the participant’s activities, assumes responsibility for plan implementation, follows up regularly, and offers support. Over the next few months, the coach checks in periodically with the participant (and adviser) to

ensure adherence to the plan and to provide assistance if necessary.

The Results/ROI

Measuring coaching success is sometimes difficult, as business development personas take time to mature. Obvious successes, such as a new client or matter, are easy to determine. A successful result, however, may also be the development of new attitudes about “sales,” a different frame of reference and a willingness to develop meaningful relationships with clients and referral sources. (An example of a “non monetary” success is a recent e-mail from a coaching client who told me that she finally had overcome her resistance to asking for business!) To help achieve these successes, participants need to track and review strategies on a regular basis. In determining effectiveness of a pro-

gram, use the “but for ... ” measurement — after a number of coaching sessions, ask participants to prepare a list of activities, ideas, initiatives they would not have undertaken ... “but for” the coaching.

CONCLUSION

It is clear that developing, supporting and maintaining successful business development training and coaching program for attorneys is a worthwhile venture. The programs, however, are as varied as there are law firms, and the components of a program are influenced by many factors. Firms must assess their goals and culture and work with a consultant to design the most effective program for the firm. Providing attorneys the much needed, and desired, training will lead to a thriving practice for years to come.



‘Tell Me More’

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A LITTLE BIT AT A TIME:

PROGRESSIVE DISCLOSURE

You know you have a first-rate TMM statement when the other person asks you a follow-up question like, “So how do you do that?” Or, “What do you mean by that?” Again, you’re not trying to be coy; you’re simply describing what you do in a winsome way to keep the dialogue going. After they ask you a follow-up question, you have two options. One is to reveal a little bit more about your practice from a benefits perspective, *i.e.*, how you make the world a better place for your clients. Here you can say things about how you help clients save/make more money, avoid disasters, build/protect reputations, solve problems, etc. The possibilities are endless.

The other option is to turn the conversation back to the other person and her business. Just try to find connections to what she cares about in her business and see how you can link back to it. For instance, if she’s in venture capital and you’re in IP, then you can ask about how she protects ideas and her investors. Key in on what’s important to the other

person and you’ll stand a much better chance of success.

CRAFTING YOUR ‘TELL ME MORE’ STATEMENT

To create a clever TMM, start by envisioning the most amazing day at work where you’re flying high: you assisted a client in a breakthrough, you oversaw a landmark deal, you settled a case and saved millions, you made someone else’s life demonstrably better, etc. Now, take a sheet of paper and start writing down all the ways in which the world is better off for your clients or partners. Don’t worry about the words, just get them down on paper. Let the words sit for a while and come back to them later.

When you return, look for the juiciest, most descriptive, and enticing words that describe how you and your firm improve the lives and businesses of others. Then explore different ways of putting the words and phrases together.

Important caveat: Don’t expect to get it right the first time. A good TMM is refined out in the field when you’re meeting and conversing with others. Since you’re not printing 10,000 brochures or having your TMM chiseled in granite (not advisable at this stage), your TMM is designed to be fluid.

Most TMMs take some time to perfect by you watching people’s reactions and paying attention to where the conversation goes based on what you say. (In case you’re wondering if I practice what I preach, my TMM is: “I help people look and sound smart when they talk.”)

Here are some good questions to ask yourself after you’ve crafted your TMM:

- Is it intriguing?
- How can you take something people have heard a million times and give it a new spin?
- Shorter is better, how can you economize your words?
- Is there a misconception about your firm/practice/etc. that you can address with your TMM? (One client tells prospects, “I’m a lawyer ... but the good kind.” It always leads to follow-up questions.)
- Are you words too rich? (Five-cent words trump 10-dollar

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