Marketing

Creating a Game Plan for Your Contacts

SALLY J. SCHMIDT | You may already know that staying top of mind with clients, referral sources and other contacts is a fundamental tenet of business development. But for many, it's a thing far easier said than done. It can, however, become much easier if you set up a process for tracking your contacts.

Many lawyers believe that rainmakers are born, not made. These natural-born marketers move through cocktail parties and networking events with uncommon ease; they have huge followings of loyal clients who sing their praises; they even generate new business from seatmates on planes.

But the reality is such "natural" rainmakers are rare. A much larger percentage of lawyers who are successful at business development get results because they are diligent, thoughtful and organized.

There are, of course, as many ways to get business as there are prospects. Yet at the same time, many lawyers would benefit from taking a more intentional approach to deepening relationships with their contacts. The following outlines a six-step game plan that can help you do exactly that.

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Step One: Compile a List of Existing Contacts

To begin, here's a crucial piece of advice for those who don't like networking, or who think they aren't very good at it: Don't lose track of people you already know! Time and inattention have a way of eroding your base of contacts. So to avoid those pitfalls, the first step is to develop a list of everyone with whom you should stay in touch.

Your list could include law school friends, current or former clients, co-counsel, other professionals, industry executives, association contacts, people in your local chamber of commerce and so on. There are myriad possibilities, but you want to have their names and contact information captured in one place. To get started on this, work with whatever resources you already have. For example, you can print your contacts from Outlook as well as your holiday card list, and then review all the names to make sure everyone you want to track is captured.

Step Two: Categorize the Contacts

Once you have a pretty comprehensive list, it is very helpful to categorize your contacts. This will make it easier to establish the priorities in your game plan, or to send out targeted messages (e.g., an e-mail alert about a development affecting contacts in a particular industry). If you're working in Outlook, you can use the Categories tab on each contact's entry to code the type of relationship. If you prefer to work in Excel, you can add columns and create fields to classify contacts. Better still, if your firm has a client relationship management (CRM) system, use it.

Some categories—such as law school classmate, client, referral source—would work for almost all lawyers' contact lists. But you could also create additional, specialized categories depending on your practice. For example, if you're a real estate lawyer, you might have different codes to designate brokers, developers and building managers. An estate planning lawyer might code accountants, trust officers and non-estate planning lawyers.

Step 3: Prioritize the Contacts

If you have done a good job of including all the appropriate people on your contact list, you may find that it would be impossible to maintain a high level of personal interaction with each and every one. So the next step is to establish your top-priority targets—these will involve important relationships that should be nurtured (such as your best clients or referral sources) or those with the greatest development opportunity (likely top prospects and potential referral sources). These high-priority targets typically deserve more regular attention.

There are different ways to do this step, but a good approach for some lawyers is to develop A, B and C lists, along the lines of this:

- The "A" contacts get at least bimonthly personal contact.
- The "B" ones are actively contacted two to four times a year.
- The "C" contacts receive more passive communications, such as holiday cards, firm newsletters and the like.

Alternatively, some lawyers will target a limited number of people (e.g., 10 to 15) who warrant special effort. These people could be general contacts or the best targets in each of the categories created in Step 2.

Step 4: Establish Objectives

Next, it is important to establish objectives for your relationships to avoid "random acts of marketing." A lunch for lunch's sake is not as effective as a lunch for which you establish—and accomplish—a specific objective.

For example, you might schedule a quarterly get-together with an accountant contact to stay top of mind and share developments in each other's practices. For a client who has used you or the firm in a limited capacity, you could have a specific objective to introduce colleagues in other related practice areas. With your best clients, your objective may be to show appreciation for the business by taking them to a special restaurant, the theater or a sports event.

Step 5: Plan Your Approach

Just as every human being is different, there is no one-size-fits-all way to build relationships. The owner of a closely held business might appreciate you having a standing monthly, one-hour breakfast meeting to discuss how things are going and what lies ahead. For an environmental consultant with whom you want to build a closer relationship, you might propose writing an article together.

Here is a laundry list of ideas:

- Schedule breakfast, lunch, dinner or after-work drinks
- Attend sporting or cultural events
- Attend industry or professional meetings together
- Visit their offices
- Present on-site seminars or training workshops at their business
- Invite them to relevant firm functions
- Work collaboratively on a project
- Introduce them to other people with whom they share a mutual interest
- Send e-mails, letters, greeting cards, gifts or notes
- Make phone calls
- Send information on new cases or changes in the law
- Find other ways to help (e.g., get them on boards or committees)
- Forward research, forms or checklists you've developed

Step 6: Execute

Once you have established the objective and determined the method of contact, it's time to implement the steps involved. But, to hold yourself accountable for following through, what system will you use to keep yourself on track? It's a good idea to develop a written action plan, and you could also use your Outlook calendar or add relationship activities to the docket system. In addition, many lawyers benefit from bringing their administrative assistants into the process, to help organize the effort and provide accountability for implementation.

Keeping the Process Going Over Time

You often hear people say that business development is a "contact sport," and there is definitely validity to that comment. The more interactions you have with someone, the more likely you are to be top of mind when that person (or one of his or her contacts) has a legal issue to address.

At the same time, it's important to remember that relationships must be mutually beneficial. Your contacts must feel they get as much value from the relationship with you as you hope to receive from them.

Over time, your list will grow and your priorities will change. But if you have established a method to organize and track your contacts, it will keep your base from eroding and your relationships will become much easier to manage. LP

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