

Play to Win

[**Meeting With a Purpose**](http://www.attorneyatwork.com/meeting-with-purpose/)

By [Sally J. Schmidt](http://www.attorneyatwork.com/author/sally-j-schmidt/) | Jan.20.14 | [Business Development](http://www.attorneyatwork.com/category/business-development/), [Daily Dispatch](http://www.attorneyatwork.com/category/articles/), [Law Practice Management](http://www.attorneyatwork.com/category/practice-management-2/), [Legal Marketing](http://www.attorneyatwork.com/category/legal-marketing-2/), [Play to Win](http://www.attorneyatwork.com/category/play-to-win/)



I will never forget the time an executive with a large international company told of his meeting with a law firm. He and a member of the in-house legal department had agreed to get together with three firm partners, at their request. After the meeting, when asked what happened, the executive replied, “Nothing, really. We talked about a number of different things but we don’t really know why they were here.”

**Squandered Business Development Opportunities**

Obviously, face-to-face meetings are an important part of business development. They provide a chance to make connections, identify opportunities and present solutions. Most lawyers I know frequently set up lunches, dinners, social activities and meetings to court referral sources and prospective clients. Yet I find an astonishing number show up to these events with scant preparation. They talk about families or football but not about business. If you ask what they accomplished, they’ll say, “We had a nice lunch.”

Now don’t get me wrong — personal connections are important. But if you intended for it to be a business development meeting, those conversations are usually not enough. It’s not just about making contact, it’s about advancing the relationship.

**Four Steps to Productive Meetings**

Would you go to trial without devising a strategy, prepping your witnesses, researching your opponents and preparing your arguments? So why would you leave your business development meetings to chance? Here are steps to make your meetings more productive.

**1. First, gather background information.** The goal is to identify common interests and potential issues.

* Check your contact’s LinkedIn profile. Look at education, postings, activities, memberships in groups and profile changes.
* Look at the organization’s website. Read about products or services, industries served, clientele and recent news. Review the bio of the person with whom you’ll be meeting.
* Google the company and the person. Look for other news or activities that might not show up on the website or LinkedIn.
* Conduct other research. For example, if it’s a public company, scan the annual report for company risks and plans. If it’s a potential client, run a conflicts check.

**2. Identify common contacts.** This information can be helpful for conversation or intelligence purposes.

* Go back to LinkedIn and look (1) in your contacts for people who are connected to the person and (2) in the person’s contacts for people you know.
* Look in the firm’s CRM system, or send a message internally asking if anyone has a relationship with the person or the company.
* Ask the people you identified to fill in the blanks about your contact, if appropriate.

**3.** **Establish your objectives**. If you are going to spend an hour or two with someone, make sure you know what you want to have accomplished when your time is up.

* Based on what you learned, what do you hope to accomplish next? There are myriad potential objectives. You might want to learn more about the company, find out how the in-house legal department is structured, learn more about the person or propose a solution to a problem.
* Advise your contact about your objective when you extend the invitation. For example, “I would love to learn a little more about your firm’s sports and entertainment practice when we meet.” That way, the other person is prepared for the conversation as well.

**4.** **Prepare your lines of questioning.** Remember, the goal of the research is to equip you to ask informed questions. Never ask a question when the answer is readily available (e.g., “So what does your company do?” or “Where did you go to school?”). My suggestions:

* Based on your objectives, prepare three to five questions you want to be sure to get answered, and write them down.
* Rehearse your questions — how you will pose them. Believe it or not, they will sound more spontaneous when you ask them if you are prepared.
* If appropriate, indicate you did your homework: “I was reading on your company’s website that you have a strong presence in the healthcare industry. What is your market share in that space?”
* If you are afraid of looking like a stalker or knowing too much, use the research to frame your questions. For example, if you read that privacy is a concern for the company, you could ask, “What are your company’s plans for dealing with privacy issues?” If you learned the person went to Duke, you could ask, “Are you a basketball fan?” (And make sure to look up how the Blue Devils are doing prior to your meeting.)

**Make a Real Connection**

Business development meetings are about making connections — both personal and professional. Whether you are involved in group get-togethers (e.g., trust officers from a bank with your estate planners) or one-on-one activities, do your research and prepare your strategy so you don’t squander the opportunity. Anything less is a waste of time — for both you and your contacts.

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