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Play to Win

Teaming Up for a Prospect Pitch Meeting

By Sally J. Schmidt | Mar.23.16 | Business Development, Daily Dispatch, Legal Marketing, Play to Win

In a feedback interview, a client told a story to explain why a particular law firm did not get the work after meeting with him. He said the firm brought a team of lawyers to the meeting and the partners were doing a good job of asking questions and discussing their capabilities. However, when asked who would be doing the bulk of the work, they turned to a young lawyer who had not said one word the entire meeting. Case closed.

Many times, it makes sense to have additional people attend a client or prospect pitch meeting. For example:

- When you need to introduce people with a different expertise than yours or who represent a different geographic location
- When lawyers in the firm have different relationships, either with the same person or with different people at the company
- When you want to show diversity
- When you want to demonstrate “bench strength”
- When you need to show a range of ages, experience and rates (for example, when a junior partner wants someone with “gray hair” in the meeting)

Beware, however, that while advance preparation is *always* important, involving multiple people in a meeting increases the need for planning.

Preparing for the Meeting

There are many things you need to learn about the client and the opportunity before meeting. There are also things you can do to prepare logistically. Here are some ideas:

- Inquire about where you will be meeting. The location or configuration of the meeting space may give you clues about the nature of the discussion (formal vs. informal) as well as the size of the group.
- Ask how many people from the client’s side will attend. If only one client representative is attending, five of you may be too many.

- Determine everyone's role in the meeting. A role must be played by every lawyer from your firm — not just in the meeting but in the proposed relationship — or they shouldn't be there. Clients complain, for example, when law firms involve diverse lawyers in pitch meetings but then don't involve them meaningfully on assignments.
- Develop an agenda and make assignments in the group for each activity:
    - Who will do the introductions
    - Who will start the meeting
    - Who will take the lead on each substantive topic
    - Who will wrap up the meeting or ask for the advance
- Get together in advance to go through the agenda and assignments and to discuss potential responses to questions.

Conducting the Meeting

At the meeting, you need to demonstrate that you are all on the same page. For example:

- Everyone should stand and shake hands with each member of the client's staff attending the meeting.
- Use business cards.
- Introduce everyone who came from the firm and explain why they were asked to attend the meeting.
- If possible, disperse your team among the client's representatives when you sit down. Avoid having all your people on one side of the table and the client's folks on the other, like a negotiation session.
- Demonstrate your teamwork and preparation in the way you hand off questions, for example, "Susan is the best one to answer that question" or "John has the most experience with that particular area."
- Do not interrupt or disagree with your colleagues.

Following Up the Meeting

After the client meeting, the group needs to continue its coordination efforts. Convene a "post-mortem" meeting to:

- Assess how things went and what could have been done better.
- Determine what follow-up should be done and by whom. The last thing you want is for four different people to send the primary client contact a follow-up email.
- Assign specific firm lawyers to specific client representatives (based on demographics, expertise or interactions) so they can continue to build personal relationships.

Clients often comment about the "lone-wolf" approach to marketing. When it comes to business development, many lawyers go it alone. Developing business can be more successful when you team with colleagues — as long as you coordinate.

***Sally J. Schmidt** is President of Schmidt Marketing, Inc., which offers marketing services to law firms. Sally was a founder and the first President of the Legal Marketing Association. She is a Fellow of the College of Law Practice Management and was one of the first inductees into the LMA's Hall of Fame. She is the author of "Marketing the Law Firm: Business Development Techniques" and "Business Development for Lawyers: Strategies for Getting and Keeping Clients." Sally writes Attorney at Work's "Play to Win" column. Follow her on Twitter @SallySchmidt.*