

# HOW WE HELPED ONE FIRM TO WIN MORE WORK

*Within a few months the firm had won new pieces of work from two prospects and for that year doubled the amount of business by implementing their first 'key' client plan.*

We have worked closely with this niche firm for 18 months providing an outsourced marketing and BD director/consultant and helping to implement best practice business development and marketing, skills, processes and behaviours.

Like many firms, they operate in a very competitive market and were looking to reposition themselves strategically – not just as lawyers within their niche practice area but also as 'advisers' around that niche, offering non-legal services too. In addition, they have a limited resource internally, a team which needed extra support for projects they wanted to progress but didn't have the time to do so. They were looking for an external viewpoint, an extra pair of hands to progress certain strategic projects and a coach to work with the Head of Marketing.

We proposed a retainer – up to a maximum number of hours per month – so that they could call on our time however they felt we could add most value, within a budget.

Working closely with the Chief Operations Officer and the Head of Marketing, via regular meetings, there were a variety of ways in which we added value and supported the firm:

- Advice, guidance and sounding board on managing the team, meetings with partners, how to deal with some difficult situations, internal communication of new plans or ways of doing things enabling the team leader to be more effective in doing so.
- Help in shaping the key client programme and plans, the outcomes being a greater number of client contacts, increased work from different business areas, stronger relationships with existing personnel, greater information on the businesses and therefore clarity about how the service needed to be improved

The key client project involved:

- initial training of marketing team and lawyers in a key client management process and skills in having good (review) meetings
- helping to write a template plan for each key client

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"The key client work has been so useful that we have now gone as far as hiring a full time client management executive."

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"I would ask Rachael's advice on all of our large projects."

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“Having independent advice is truly indispensable. An individual that understands your business but is able to apply the view of an ‘outsider.’ ”

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- advice on putting together post-matter reviews and coaching through how to run them face to face; these reviews now take place after every substantive piece of work
  - suggestions of key performance indicators that might be used within the firm to measure success
  - advice on re-wording their client engagement letter
  - ideas on how to collate and present qualitative and quantitative information from the client reviews
- Strategic research into the marketplace, both for legal and non-legal services, which provided the platform to reposition the firm.
  - Improved the success rate of proposals: within the first few months of launching a new approach the firm won two significant pieces of work from prospects. Having given feedback on some recent proposals, most of which had been unsuccessful, we gave advice and guidance on future proposal documents (content, format, and approach) to make them more compelling: less about the firm and more about meeting the needs of the prospects.
  - Provided initial thoughts to what business development key performance indicators were both desirable and practical, which were fed into a balanced scorecard approach to managing staff. It is now easier for the firm to understand how they would like individuals to contribute and provides clarity for those people who are clear about how they can be involved.
  - Helped to refine target prospect lists and research those companies, providing information on the business, structure, key personnel, plans and news. This information provided the firm with ideas about what content to build (articles, opinion papers, seminars) that would be relevant, interesting and of value to those contacts.
  - Increase in the amount of cross-selling done within the firm. Defined what good cross-selling is and is not and articulated the behaviours that need to be encouraged to improve how much cross-selling is done and to make sure it is always relevant. Discussion about how to overcome some of the barriers the firm was experiencing. This was then used to roll-out a series of discussions to encourage people to think both of which clients they would like to work for and which colleagues it would be worth introducing to their clients.
  - Looked over and provided feedback on draft marketing plans, documents, questionnaires, internal presentations and communications and reports to make them more succinct, give more clarity when needed, and raise questions that needed to be answered.

- To help the firm's thinking and development of a new product, research was undertaken into an ISO standard and some guidance was given about how that might be translated into a new 'standard'.
- Developed a Linked In guide to ensure consistency within the firm and help them set up (some of them for the first time), engaging profiles. The guide also contained some first steps advice about how to use Linked In effectively.
- Support in helping the firm develop their own 'healthcheck' related to a specific area of work that was then used to send to both clients and prospects as a way of maintaining contact, adding value and demonstrating their expertise.

Whilst there were a few face to face meetings, much of the work was done with regular telephone meetings, making sure that time and budgets were managed effectively.

## What are the secrets of success when it comes to working with someone external?

As the Head of Marketing from this firm said: "Allowing them 'in' to your firm. It's vitally important that they understand the culture of your company in order to provide the right advice."

She goes on to say, in describing the benefits and value of working with us: "I personally have benefited hugely from your advice and guidance. I don't believe I would have reached the position I'm in today without [your] help... Highly recommended: in today's business environment we can all benefit from the external view of a consultant. The fresh perspective and the wealth of knowledge that you provide us with is something our business believes to be indispensable."

*All quotes were given by the Head of Marketing at a niche law practice.*

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