

## *Associates – Eight steps to keep business development on track*

### Step by step: Associates



- Associates face special challenges in business development, primarily due to their lack of time.
- Tactics that are exactly right for other lawyers may be wrong for associates, because they distract them from more urgent tasks.
- This eight step process will help assure that associates do first things first.

### **Step 1. Review your firm's policies and expectations**

Different firms have different policies regarding associate marketing, and you need to start by understanding exactly what is expected of associates at your level. So, before you do anything else, speak to several people about how your firm sees the associate role in marketing.

- What would the firm like you to achieve?
- How much time can you devote to business development?

Limit this step to a few hours. In some firms, that will be more than enough time, because the answer is straightforward and clear-cut. But if you find that different partners have substantially different views on this, just find out what a few key people think, and move on to the next step.

### **Step 2. Schedule at least an hour or two for business development, every week**

If it's not on your calendar, you probably won't do it. So if you decide to invest two hours per week in developing new business, pick a block of time such as 12-2 PM every Tuesday, and put it in your appointment software or book.

We recommend choosing a day early in the week, so that you can reschedule it if something else comes up. And the middle of the day is a good time, because some of your activities may involve lunch. For more details, see *Planning - How much time do you need for business development?*

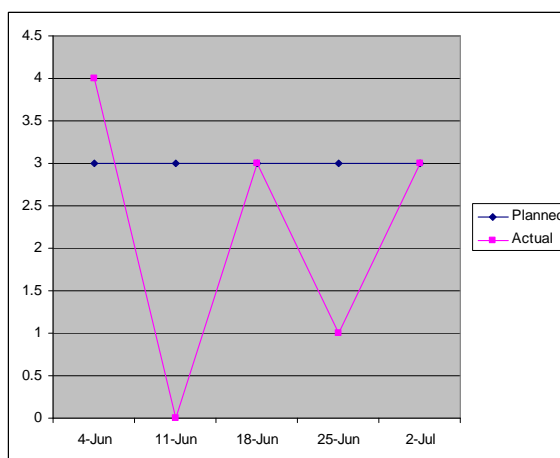
### Step 3. Track the time you actually spend on business development, every week

As management guru Tom Peters put it: “What gets measured gets done.” So if you are serious about developing new business, you will need a continuing system to track your time and your efforts.

If your firm will support your efforts and has a time code that fits, tracking it in the official system can be useful. But whether you do it on the record or off the record, you should keep a simple list like this on your bulletin board to remind yourself of exactly where you stand

Week of	Hours on biz dev
<b>GOAL</b>	<b>3</b>
6/4	4
6/11	0
6/18	3
6/25	1
7/2	3

If you like to graph things in Excel, do it, because a picture like this is worth a thousand words:



You may be thinking it would be better to track time every month. Great minds think alike: that’s what I said to my first sales coach. What he said to me was: “Doing it monthly makes it too easy to put it off, and to fall behind. Do it every week.”

For more details, see *Follow-up – Sample reports to improve tracking*.

#### **Step 4. Define your long-term goal**

Develop a long-term plan for defining your legal identity, the niche services you want to provide, and how to become visible to potential clients. For more details, see *Planning – Define your niche* and *Planning – Define your ideal clients*.

#### **Step 5. Develop an “elevator speech”**

As you begin to talk to others about your goals and activities, it is often helpful to have a sentence or two ready that summarizes your background and/or what you want to achieve. For more details, see *Elevator speech – Do you need one?* and *Elevator speech – Six steps to create or improve your elevator speech*.

#### **Step 6. Get advice from other lawyers.**

- Go to lunch with a mentor or your practice group leader to discuss the firm’s approach to marketing, the role of associates, and how you can help partners meet their goals.
- Talk to senior associates and to partners about how business development really works in your firm. Get them talking about how they found their top clients, what has worked for them, and what hasn’t.
- Schedule a meeting with someone in the firm’s business development or marketing department to discuss resources available to you and how they can help you achieve your goals.
- Ask other lawyers
  - What organizations should I join?
  - What should I read?
  - If you were in my position, what would you do?

#### **Step 7. Prioritize relentlessly**

For time-limited associates, prioritizing is by far the most important step. Start by listing action items based on your research and/or the items below. Then decide which action item is likely to provide the best return on your time, and start there.

- ❑ Build personal and professional relationships with others at your level in client organizations. (But talk to others in your firm first to make sure you understand what types of contacts are encouraged for associates, and what types are not.)
- ❑ Consider the importance of “internal marketing” within your firm.
  - Your most important “clients” may be the partners and senior associates you work for.
  - Ask them to rate their satisfaction on a scale from 1 to 10. Then ask how to increase that rating, even if you are already a 10.
  - Make sure you know the partners who do the sort of legal work you want to pursue, and make sure they know you.
  - Get to know the administrative and business staff who can make your life easy. Recognize the help they provide, and thank them for it.
- ❑ Make a list of all the people you should keep in touch with, from law school classmates to college friends and acquaintances, and establish simple systems and habits to stay “top of mind.”
  - With your peers, recognize that it may take years before they rise to positions where they could hire your firm.
  - Nevertheless, now is the time to keep developing those relationships.
  - For details, see *Follow-up – A checklist of best practices for keeping in touch* and *Re-connecting – Six steps to reconnect with past clients and colleagues*.
- ❑ Consider joining a trade association or community group where you could meet potential clients.
- ❑ Consider whether speaking and/or writing is a good way to increase your visibility, and whether it is the best use of your limited time. (For details, see *Speaking – Six steps to increase results from speeches* and *Publishing – Five steps to increase results from writing articles and books* .)
- ❑ Consider becoming active in your local bar association.
  - This can have many benefits above and beyond business development, but it can also take a lot of time.
  - On the plus side, many lawyers find this to be a low stress way to begin networking.
  - On the minus side, depending on the nature of your practice, most of the people you meet may be competitors who would never send work to your firm.

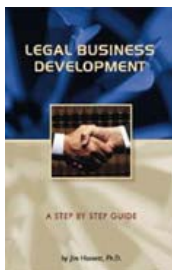
- Ask yourself how likely you are to get new engagements through the people you meet, and whether this is the best use of your limited business development time.
- For ideas on how to increase business with current clients, see *Clients, current – Four steps to protect and increase business with current clients*.
- For more ideas on how to find new clients, see *Clients, new – How to find new clients, step by step*.

### Step 8. Follow up consistently

The single most important factor in developing new business is following up, week after week, month after month, and year after year. For details, see *Planning – A three step process to improve business development results*. It won't always be easy, but it will work.

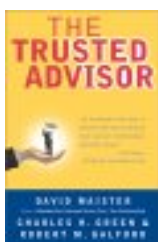
### Books – Recommended resources

This list can also be viewed on Amazon by going to the Free Resources section of our website ([www.legalbizdev.com/free](http://www.legalbizdev.com/free)) and clicking on the link for *Top sales and marketing books for lawyers*.



1. *Legal Business Development: A Step by Step Guide* by Jim Hassett

I may not be entirely objective, since I wrote this book. But if you want practical and immediate advice to develop new business, I think this is the book to start with. My clients and friends agree.



2. *The Trusted Advisor* by David H. Maister

A great choice for lawyers who are just starting to market, and correctly focusing on current clients first. Explains how to build trust, and how to put trust to work to build your practice.



3. *Rainmaking Made Simple: What Every Professional Must Know* by Mark M. Maraia

Perfect for lawyers who are starting to look for new clients, because its 48 short, practical chapters can be used as job aids—read only what you need, exactly when you need it.