LSSO[SM] LEGAL SALES AND SERVICE ORGANIZATION

15 Sales and Service Suggestions

1) **GET IT IN WRITING.** Write down your sales goals. Be sure to make them measurable ($500K in fees or three new matters in the next 12 months). You are more likely to achieve your sales goals if they are in writing. Check your goals every 3 months to be sure you are on target.

2) **IT'S A LONG-TERM PROCESS.** It takes 6-8 contacts with a prospect before closing the business. Don't stop communications if you are not hired during the first few interactions. Continue to be helpful.

3) **GO THERE.** Visit clients at their offices rather than have meetings in yours.

4) **LEVERAGE CLIENT RELATIONSHIPS.** Your clients are the best source for new business whether for a new matter or transaction or a referral to a friend/colleague. Ask clients for referrals.

5) **ASK QUESTIONS AND LISTEN.** When meeting a prospect, practice the "80/20," or "deposition" rule: *80% of the time: LISTEN. 20% of the time: SPEAK AND ASK QUESTIONS*

6) **GENERATE LEADS.** Provide attendees at events and speaking engagements with a form to fill out so you can contact them in the future, add them to your mailing list, or meet.

7) **ADD VALUE TO INVOICES.** Use invoices as service tools. Include a suggestion or feedback card with your invoices. Don't forget to acknowledge your client's suggestions.

8) **SPEND WISELY.** Track how, when, and where your clients are generated with a new client intake form. Review this data at least once a year. The analysis helps you make decisions about how to invest your time and money.

9) **FIND OUT.** Before soliciting business from a new prospect, e-mail everyone in the firm to ask if anyone else has relationships with the company and/or person. E-mail your referral network and other professional service providers.

10) **FOLLOW UP.** Don't leave a meeting without a follow-up timeframe. "When should we touch base again?" "If you send me your document, I'll review it and get back to you by the end of the week." "What are our next steps?"

11) **SCHEDULE EARLY AND OFTEN.** Try to schedule your appointments with prospective clients early in the morning. The meeting will less likely be cancelled and it won't take too much time away from your billable hours.

12) **KEEP IN CONTACT.** Touch base with each of your contacts at least 4 times a year. Maintain your database! Review and update with new clients, prospect and referral sources. Make sure contact information stays current. Inactive clients still think of you as their counsel.

13) **GET PERSONAL.** Get to know your clients and prospects personally. Spend time off the clock at their offices and doing something that interests both of you.

14) **WELCOME NEW CLIENTS.** When you obtain a first-time client, provide the client with a welcome packet. Include questions and answers about the firm; who to contact regarding an invoice, weekend and after hours contact information; relevant client alerts or newsletters; and information about others in the firm.

15) **HAVE A GREAT STAFF.** Provide staff with a client service skills training program at least annually. Recognize those who go above and beyond the client's needs.