

Attorney Training: A Consultant's Perspective



By William J. Flannery, Jr., JD

Many lawyers don't like to market because they feel that they lack the skills to market. They feel that they cannot be trained to do something that is a "natural born gift." Training lawyers to market can be difficult; however, every lawyer can learn to make rain.

One need not be an expert in marketing or client relations to realize that the vast majority of lawyers could benefit from formalized marketing and client development training. One of the stumbling blocks to training has been the lack of recognition by the lawyers that they need formalized training. Other major challenges are finding, developing or modifying available courses and instructors to meet the needs and the "culture" of the firm.



Your lawyers need an organized marketing training program if any of the following conditions exist in your firm:

- The lawyers don't make follow-up calls on prospective clients after the firm held a seminar, open house or other firm function.
- Less than 20 percent of the lawyers account for more than 80 percent of the new business origination.
- The lawyers spend more time in meetings talking about marketing than they spend in face-to-face marketing.
- The lawyers are not, nor have they been, asked to participate in competitive business presentations.
- The lawyers know little about their client's business outside of their immediate practice area.
- The lawyers cannot describe the firm in terms that clearly differentiates the firm from all other competitors.
- The lawyers say that they have a marketing program because the firm has retained a public relations consultant, hired a marketing director, or published a brochure or a newsletter.
- The lawyers describe marketing as concepts rather than real life activities, such as client presentations, calls on prospective clients or developing new clients.

Perhaps you have observed the frustration that your lawyers and the firm's managing partner feel when one or more of these conditions existed. The answer clearly lies with training. Firms that have taken on the training challenge report that their lawyers are taking the "next step." Their lawyers are proactive with clients and prospective clients. This newfound confidence comes from a better understanding of how and why clients make decisions for legal services. The art of rainmaking has always been viewed with some degree of mystique. Many lawyers feel that personality type determines the rainmaker's success and, therefore, such skills cannot be taught. Despite this widely held belief, about 40 firms nationwide have decided to train their lawyers in marketing and client relationship management skills. The firms are in cities of all sizes. The firms vary in size from two to over 400 lawyers. Their clients, markets and practice areas vary widely. However, their strategy is the same...to be effective at marketing you must know how to do it in a systematic, ethical and professional way. These are skills that require formalized training.



An ideal training course should be designed to teach all of the firm's lawyers - partners, associates, rainmakers and

"drought makers." The rationale is that all lawyers have clients, therefore, there is a need to learn client relationship skills. The single biggest impediment to implementing training has been lawyers who view marketing as either a passing fad or fear that it signals a firm in decline. These fears can also be the result of an attitude toward client development that sees all marketing activities as unethical or unproductive. These concerns must be aired and resolved early on if the training is to be successful.

The ideal course should not be a quick fix to a client or revenue crisis. Experience has shown that a two-day retreat is not adequate time to address concerns, train lawyers, implement a strategy and identify client opportunities. The size of the group to be trained should be small enough to allow for individual discussion; and ideal size is approximately 12 lawyers. The length of the training can vary but each lawyer should expect to spend at least 18 to 24 hours of combined class and workshop activities. The best way to train is to use a mock marketing case study. The case study should be as close to a real life client situation as possible, and should be designed so that it is sophisticated enough to challenge the lawyers to participate. You should also consider having several of your lawyers role play the general counsel or other executives in the hypothetical case study. The next step is to videotape your lawyers making calls to these "clients." The tape clearly allows the lawyers to develop their

listening and questioning skills. Because much of marketing is face-to-face meetings, the videotaping allows the lawyers to view their nonverbal communications skills, or body language. The instructor should spend time with lawyers individually to help them develop their strengths and work on their weaknesses. An added benefit is that often new hidden marketing talent is discovered and encouraged. Another tool for effective learning is to divide the group of 12 lawyers in half and have them compete for the business with this hypothetical client. Lastly, the training should include how to compete in the business presentation environment...the beauty contests.

Most firms have not considered training their lawyers. Instead they have spent both time and energy on brochures, seminars, newsletters,

articles, speeches and client entertainment. These activities still play a role in developing business. The real test for marketing effectiveness is if your lawyers are able to use these support materials in their calls on clients and develop more profitable business relationships.

Several firms have institutionalized their training. The first-year associates are given an introductory course and each class after that receives

additional training each year. This enables the firm to have a well-trained group of partners later on without having to ask the partners to give up substantial time. Several firms have been successful in obtaining CLE credit for the training.

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Next Steps

Currently, marketing training is a hot subject within the ranks of lawyers, legal administrators and marketing directors. The questions for your lawyers are:

- Can I make an effective marketing call?
- Can I make calls without training?
- Am I willing to learn new skills?
- Will I devote the time to be trained?

- What are the alternatives - mentoring, watching a video course, reading an article?
- Who will do the training?

Many lawyers are skeptical of marketing training and don't want to be on the "leading edge." Therefore, the most frequently asked question is "Who else is doing this?" As in any competitive situation, training and preparation can be the difference between winning and losing. The firm that trains its lawyers will have an edge - the competitive edge.

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