



Case study: How we helped a niche law firm step up their marketing

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

We worked closely with this niche firm for nearly two years, as an outsourced marketing and BD director, helping to implement best practice business development and marketing, skills, processes and behaviours. The end result was supporting them in stepping up their marketing and business development.

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 offering non-legal and legal services.

In addition, they had a limited resource internally, a team which needed extra support for projects they wanted to get on with but didn't have the time to progress .

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.



I don't believe we would have reached the position we're in today without [your] help.



The support we put in place

Working closely with the Chief Operations Officer and the Head of Marketing there were many ways in which we helped to transform their marketing and business development:

- **Advice, guidance and sounding board** on managing the team, meetings with partners, how to deal with difficult situations, internal communication of new plans or ways of doing things enabling the team leader to be more effective in doing so.
- Help to shape the **key client programme and plans**.
- **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**: developed a replicable approach and advised on specific pitches. Within the first few months of this new approach the firm won two significant pieces of work from prospects.
- Advice on 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
- **Feedback** on draft marketing plans, questionnaires, reports and internal presentations and communications 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'.
- **Help to develop their own 'health check'** 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.



The fresh perspective your wealth of knowledge provides is something our business believes to be indispensable.



How proactively managing key clients bore fruit

The key client project involved a number of steps, starting with initial training of the marketing team and lawyers in best practice key account management.

Other elements of the programme included:

- helping to write a template plan for each key client.
- advice on post-matter reviews and coaching on 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 and other client-facing communications.
- ideas on how to collate and present qualitative and quantitative information from the client reviews.

Identifying the opportunities to cross-sell

As with many firms, we identified that there was genuine scope to expand the work the firm did for these key clients. Services they could offer that were relevant and timely. So what were the elements of an effective cross-selling programme?

- We 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.
- We looked at how to overcome some of the barriers the firm was experiencing.
- This was then used to rollout 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.

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

As the Head of Marketing said: "Allowing you in to our firm. It's vitally important that you understood the culture of the firm in order to provide the right advice."

She goes on to say, in describing the value of working with us: "I personally have benefited hugely from your advice and guidance. I don't believe we would have reached the position we're in today without [your] help. 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 provided us with is something our business believes to be indispensable."

All quotes were given by the Head of Marketing.

Key project outcomes:

- Increased number of relationships with key people at the client company
- More work from different business areas
- Stronger relationships with existing personnel
- Greater information on the business and their plans enabling the firm to identify opportunities to add even more value