## Your essential guide to law firm marketing

How to build relationships with reporters, get the inbound marketing engine rolling, and seal the deal with tailored, consistent, pitches and proposals.

With expert advice from Larry Bodine, Editor in Chief of The National Trial Lawyers website, James Lee, CEO of Perceptio, and Ray Meiring, CEO of Qorus Software







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### Introduction

The days of wooing new clients over fancy dinners and lunches are long gone. Market saturation, globalization, and fee pressures mean that in order to succeed, your firm needs to be actively finding and attracting new clients.

But that's easier said than done. PR can quickly become a half-hearted process of throwing a (let's be honest) boring firm announcement out to the media every now and then, often with little effect. Yet how is it that partners and attorneys from competing firms always get quoted in the news?

Your website can quickly become a source of frustration too – especially if you, like most firms, have spent a fortune redesigning and building it, but are now struggling to justify the spend because it's just not bringing in the leads you thought it would.

And then there's the pitch. You know that your presentations are a bit uninspired and perhaps too generic, but there's just no time or resource to do much about it.

Yup, there's no denying that it's a tricky time to be a law firm marketer.

That's why we created this eBook. It's the first in what we hope will become an annual series for law firm marketers – a collaborative effort from three people who all work closely with legal marketing teams:



#### Larry Bodine: Legal PR and media relations



For over 15 years Larry Bodine has advised hundreds of law firms about attracting new clients. He has revamped dozens of websites, conducted marketing retreats and trained many individuals. He was Director of Communications of Sidley Austin in Chicago for nine years.

Larry is currently the Editor in Chief of The National Trial Lawyers website and PersonalInjury.com, updating both throughout the day with news of verdicts, settlements, trial practice and marketing advice.

Larry has launched several online ventures that are considered the top destinations for information about attorney marketing, including:

- The LawMarketing Blog at <a href="http://larrybodine.com/blog">http://larrybodine.com/blog</a>
- The LawMarketing Portal Web site, <u>www.LawMarketing.com</u>, a news and information website.



#### James Lee: Inbound marketing for law firms

James Lee is the CEO of Perceptio, a full-service Inbound agency, and HubSpot's partner company for working with law firms and professional services. Perceptio is based in Colorado, USA, but works with firms worldwide.

James has a strong entrepreneurial, business communications and business strategy background that has garnered accolades from several Fortune 500 companies. His differentiated blend of skills is rightfully at home in operating as a bridge between Perceptio's clients and their audiences.

To learn more about Perceptio, visit: <u>http://perceptioinc.com/</u>



#### Ray Meiring: Content and pitch management for law firms

Ray Meiring is the CEO and chief visionary of Qorus Software, a leading pitch and proposal management solution provider for the legal sector.

Core to Qorus' success is the conviction that software should be simple, intuitive and easy to use. Which is why its solutions are built using well-known Microsoft applications like Word, PowerPoint and SharePoint.

Qorus is headquartered in Seattle, USA, but has offices in the UK and South Africa and works with firms around the world. To learn more about Qorus Software, visit: <u>www.qorusdocs.com</u>

## <u> Part 1</u>

### How to make friends with reporters and influence the press

By Larry Bodine, <u>www.LarryBodine.com</u>, Editor of The National Trial Lawyers

There are some recurring questions that arise when lawyers deal with newspaper reporters and magazine writers:

- Why is it that one lawyer from a competing firm is always quoted in the news? You wonder who appointed that guy an expert anyway, and why do the papers call him?
- Why doesn't the press ever call you? You handle lots of interesting cases but people never read about that in the paper.
- What do you say to a reporter when he or she calls? How do you know you can trust him? What if he
  doesn't get the facts right?

Let me offer some answers to these questions. I've spent most of the last 20 years working as a newspaperman and editor, reporting and editing news about the law.

Dealing successfully with the press is a pretty straightforward matter, so long as you understand how the news business works.

These days it's not enough to be an excellent lawyer who does top quality work. Prospective clients have to know about you to find you. The media can get your message out more widely than you can as an individual —and do so in the credibility of a news story. The key to success with the press is to become a source to a reporter. There are lawyers everywhere who have mastered this simple trick. I'll describe how they do it.



"Dealing successfully with the press is a pretty straightforward matter, so long as you understand how the news business works."

### Benefits of being a source

There are numerous benefits to being a source. First, your name will be exposed frequently to potential clients. Second, if there is some bad news the newspaper has to write about you, the reporter may give you a break. After all, he has to protect his valued source, and will try to go easy on someone who has helped him in the past.

This all fits into an informal system of rewards and punishments. Lawyers who are sources are quoted often and protected in bad times. Unresponsive lawyers are ignored, until there is trouble at their firm, which is then reported with gusto.

Let me sketch out what it is like to be a reporter. Most reporters are people in their 30s and 40s. They're bright, inquisitive people; they have college degrees and some have law and graduate degrees. They were attracted to the job by the glamor surrounding journalism, the excitement of being the first to know the news before everyone else, and the variety of the work. They are trained on the job to learn fast, because they are constantly thrown into unfamiliar situations that they have to figure out and write about later.

Many reporters view their work as a public service; their motivating drive is to smoke out hidden corruption or to expose wrongdoing. Reporters pride themselves on being tough enough to get to the truth of a matter. They don't ever want to appear to be weak or to be somebody's patsy. They are very competitive with each other and take great satisfaction in being the first to break a story. They all know about Woodward and Bernstein, and they secretly dream about winning a major journalism prize. But meanwhile they write bread and butter stories and feature articles, and cover regular beats, and this is where you can come in.

The currency of the news business is a good story. The newspaper is principally composed of advertisements. These go into the paper first. The void that must be filled every day is referred to as the "news hole." Editors are always hounding reporters to fill the news hole. Reporters are always looking for something new, something that's taking place right now. They have no secretaries, they answer their own phones, and do their own typing. They have little privacy, and sit at desks in big open rooms or in cubicles. Newsrooms are busy, noisy and boisterous. They work against deadlines, and the deadlines are immutable. Once the deadline hits, the day is over — there is no extension. The one place of comfort a reporter can find in all this pressure is his sources.

- A source is someone who calls the reporter back within the hour.
- A source is someone who always has a quick and catchy quote he can use.
- A source is someone who, if he doesn't have the answer, will do some checking and at least get back to the reporter with something.
- A source is someone who calls from time to time with little tips and an occasional story idea.

Becoming a source usually starts with a phone call. There are ways to attract a call from the reporter:

- Get active on a bar association committee and get listed in their directory as a member. These are the references that reporters use to find an expert in a subject area.
- Speak at educational programs and seminars, and make sure the reporters you want to reach are invited. Be sure to send them a copy of your text, with a friendly note inviting them to call if they have any questions.
- Get active in civic affairs and business events that you read about in the paper. Reporters often cover these events and it's easy to walk up to a reporter after the event and introduce yourself.

There is nothing wrong with calling up a reporter yourself. But first get a sense for what the reporter writes about. Follow his byline and read his stories. Figure out how your practice fits in to what he writes about. Then call up with a friendly suggestion for a story idea. Do not call up and say something to the effect that you are in practice and are available for a profile. This will get you nowhere. Instead, call with information about an activity you are working on right now. This can be an action that you have filed, the successful conclusion of a matter, or something that's going on in the public domain.

It is important that your story idea has what is called in the news business a "time peg." A news story has to be pegged to an event on a specific date. It is ideal to call the day before something happens, or the actual day of a verdict or filing. This timeliness gives your story tremendous urgency. On the other hand, if you call up about something that happened last week, there is no time peg. This makes the story very uninteresting. "There is nothing wrong with calling up a reporter yourself. But first get a sense for what the reporter writes about."



### When a reporter calls

Suppose you come to your office and discover a message from a reporter, asking you to call back. There are three important rules of dealing with the press successfully that every lawyer should know.

**Rule One:** always return reporters' calls. The reporter will do the story anyway: a good one where you could have been quoted as an "expert"; a neutral one, where you could have earned "points" with the reporter for future consideration; or a negative one, where you could have gotten your side in.

**Rule Two:** call back within the hour if possible, and within the same day in any event. Reporters are always working against a deadline, usually expiring the same day they are calling. If you call back too late, you'll miss your chance to shape the story and promote your firm. Worse, you'll convince the reporter that you are unresponsive and he won't call you again. Opportunities for good publicity are short-lived.

**Rule Three:** give the reporter something he can use. If you leave them with nothing, they have no reason to ever call you again. Suppose a reporter calls you and he's working on a story, and you don't have the answer to his questions. Rather than say "I don't know, I can't help you," tell him you'll do some checking and call him right back. In the interim, gather your thoughts. Set your agenda: decide what you want to accomplish, the points you want to make in the interview, how you'll fit in mentions of the firm in the conversation. Call back with a statistic, a quote or another person to call. Just be sure to give the reporter something he can use.

# "The idea is to build an acquaintanceship."



Once you've made a good contact with a reporter, follow up and offer to meet him for lunch or breakfast. The idea is to build an acquaintanceship. Remember to bring at least one story idea to the meeting. Reporters like to be treated like regular people. Don't regard them as underpaid scriveners in an unlicensed profession, or on the other hand, as dangerous prima donnas who wield immense power. Reporters like to be taken into another's confidence and to find out what's really happening behind the scenes. It's easy to talk to a reporter, because they are innate gossips. They love to talk about people, sports and politics. They also love it when you talk about a story they've written recently.

There are several sure-fire ways to alienate a reporter. If you do this, they may get even with you by slanting a story against you. Or even worse, they may give you journalistic capital punishment, which is "media death," and you will never, ever appear in the publication again. For example:

- Don't ask to review a story before it is published, or to have your quotes read back to you. The questions come off as an effort to control the reporter and you'll sound insulting. Instead, offer to be available if the reporter has further questions or wants to check details for accuracy.
- Don't hang up, and later call back after a conversation is over, and ask to have your comments struck or changed. This undoes the work the reporter has finished, and undermines your own credibility. If you compose your thoughts in advance and clarify when you are off the record, you won't run into this problem.



- Don't make the reporter miss a deadline. Call back within the hour if you can. They live and die by deadlines. If you promise information by a certain time, make sure it arrives on time.
- Don't get belligerent, argue or "fence" with the reporter. Remember, the reporter or editor has the final "cut," and through placement and context-setting can make you look foolish. Furthermore, if you say angry or argumentative things, it will reflect badly on you in print.
- Finally, if you have to say "no comment," at least offer a reason such as client confidentiality, explaining why you can't respond. Newspaper readers take "no comment" as an admission of guilt, and it sounds evasive and uncooperative.

Let me say a little about "on the record" and "off the record." If you want to go off the record, say so in advance before you say anything else. It's no good to make a statement and then add, "oh by the way, that's off the record." The reporter will feel no obligation to honor an after-the-fact request. Generally, off the record means that the information you give will not be used for publication. "Not for attribution" means the reporter can use the information, but cannot attribute it to you. Every reporter has his own definition of off the record. If you think there is a question about it, state what you mean by "off the record," For example, say "let's go off the record. Don't publish what I'm about to say or attribute the information to me."



### The story is published

And then comes the moment when the story appears in the paper or online. Chances are very good it will not be exactly the way you would have written it. Remember that reporting is not a trial transcript. If the story is even close to what you presented, be satisfied. If the firm name was mentioned in any kind of positive context, you should be ecstatic.

But sometimes the result may not be so good. If so, be very cautious about complaining. If the reporter forgot to mention you, don't worry about it. As a source, you'll have another chance later. If the story got some of the facts wrong, that's life in the big city. The danger in calling up the reporter to complain, is he probably won't bother with you again. If you go over the reporter's head and complain to the editor, it's likely the paper will never call anyone in your firm again. Now, I'm not talking about a clear cut case of defamatory falsehoods, I'm talking about garbling some of the facts. You have to adopt the attitude that close enough is good enough. Reporters write 200 to 500 stories a year, and they are very touchy about criticism.

So, to sum up, your best approach is to become a friendly source:

- Get active to attract a call from a reporter.
- Pick up the phone and call a reporter with a story idea.
- Call back quickly if you find a phone message from a reporter.
- Always leave the reporter with something he can use.
- Don't alienate the reporter.

Being a source will buy you protection from cheap shots, and mild treatment when there is bad news to cover. But the real benefit comes in finding your name quoted on the business pages, and read by the executives in companies that have legal work for your law firm. "If you go over the reporter's head and complain to the editor, it's likely the paper will never call anyone in your firm again."

## <u>Part 2</u>

### Inbound's place in your firm's business development

By James Lee, CEO of Perceptio Inc

If your firm is like most, it's continually bombarded with the newest hot thing in marketing, especially when it comes to the digital world. SEO, Pay Per Click, Tweeting...You hear so much, you don't know what (if any of it) to believe, much less invest in. Let's face it, it can be frustrating, annoying, confusing and frankly, exhausting. And maybe you want to say "to hell with it" and do nothing...but you know deep down that you have to do something. After all, you're fully aware that the world has changed, that your current and future clients are informed by the digital landscape, and that if you don't address their needs, someone will.

If this sounds even vaguely familiar, know this – none of this anxiety is necessary. Not the fear of being out maneuvered online by competitors, not the confusion of how to use technology to drive effective business development, not the "pay and pray" approach of unmeasurable marketing ROI – none of it. The solution has already been heavily researched, developed and optimized in a single, continually adapting and advancing methodology called Inbound Marketing.

We often refer to Inbound Marketing simply as "Inbound", because adding the term "marketing" is limiting in terms of what Inbound provides. While Inbound is marketing (highly productive marketing), it's also an enormously effective methodology for business development – bringing clients straight to your door in a traceable way. Additionally, it gives its users a very clear view into their client's path, highly measureable results and even a clear window into the program's ROI. Inbound is not a fad or phase that will pass. It is increasingly the standard, being rooted in technology and based on target persona behaviors. Its ability to grow and morph with the future is profound and unsurpassed.

### So what exactly is inbound anyway?

When discussing Inbound, many tend to think about content marketing, or social media, or SEO. A very few might even have software or automation platforms in mind, maybe even data collection and analytics. Some may think email has something to do with it, or their website.

The truth is that all of these are important functional parts of an Inbound program. But individually, they are only parts, and like building any machine, just having all the parts doesn't mean you can throw them together and have something useful and functional. In order to achieve that, those parts have to be assembled in a way and to the right degree that allows them to work together to effectively achieve fluid functionality.

In order to really understand Inbound, you've got to go further than just the mechanics of it. You've got to start with *why* an approach to marketing / business development outside of the traditional (or outbound) is needed to begin with. Once you understand the necessity of it, then the philosophy behind Inbound will be obvious. And once you've got that, understanding why all the pieces work together will suddenly make sense. "While Inbound is marketing, it's also an enormously effective methodology for business development - bringing clients straight to your door in a traceable way."



### The necessity and philosophy of inbound

As a philosophy, Inbound marketing is based on the truth that consumers buy differently today than they did ten years ago, and adapting to those changes requires marketing with a magnet rather than a sledgehammer. It's those changes in how purchasing / service hiring decisions are made that made it necessary to develop a new philosophy and approach.

In years past, prospective clients were less informed, and their journey to becoming a client was more linear, with less access to information that addressed their pain points. To a large extent, they were held captive to forced sales information, and the widely accepted marketing playbook reflected that. It was interruptive and often intrusive (cold calls, radio ads, TV ads, print ads, even pop-up ads and instant play video). The prospects may not have liked it, but what were they going to do?

Technology changed all of that in several ways. The consumer gained access to enormous amounts of information, and could weed through it quickly to find what was relevant to them and what wasn't. Advances in technology (DVRs, caller ID, spam software, and so on) also allowed them to bypass intrusive or forced information if they wanted to.

And guess what? They wanted to! They didn't have to put up with it anymore, so they didn't – the *control* fell entirely in the prospect's court. With better-informed and technologically-empowered prospects, the old playbook quickly fell out of favor, lost effectiveness, and was greatly surpassed by newer methods. "People buy differently today than they did ten years ago, and adapting to those changes requires marketing with a magnet rather than a sledgehammer."



Image credit: HubSpot

### The rules have changed... but now what?

With the changes now obvious, it became clear that an effective marketing playbook had to be created that played according to the prospect's rules. They are no longer going to accept force-feeding, so what do they want? It turns out, a number of things.

- They want access to quality information about the problems they face
- They want to understand how to alleviate their pain points
- They want to consume information at their discretion and on their time table
- They want information in a form factor that is convenient and easy for them to consume
- Perhaps most surprising to many law firms prospects want the information they are looking for to be where THEY are

This presented a problem with no simple solution, and it wasn't going to be as easy as tweaking some of the traditional methods. For a long time, marketers and firm leaders alike looked at this situation and decided to follow piecemealed advice. So they opened up social media accounts, paid someone to rework the SEO of their website, maybe even started a blog that no one wanted to keep up. For firms that took this approach, some credit and applause is deserved. They at least saw the shifting sands and tried to do something...but ultimately it didn't work for them in nearly every case. "Having some of the parts isn't going to build you a smoothly working machine."



Why not? Because just having some of the parts isn't going to build you a smoothly working machine. Wiring a tire to a transmission and a gas tank doesn't give you a car...it just won't go unless you are coincidentally sitting on a very steep hill (and even then it won't get you far).

Luckily, there are very smart people who study technology, buying decision behaviors, and how they work together. What these very smart people did was take an in-depth look at the many ways people interact with technology, and how they now make their purchasing (in our case, services) decisions. Then they went further and studied how corporations and other organizations behaved as well, then added it all together to gain an overall comparison and view.

What they found probably isn't that surprising for most of us: businesses, organizations and individuals all follow a very similar approach when making decisions. They have access to the same tools (thanks to technology) and use those tools in the same ways.

Having this basic piece of information, they analyzed what these decision-making people were looking for and how they went about finding it.

Ultimately, they figured out how the pieces fit...and created a methodology born out of technology, analytics and data that not only gets results, but continually adapts with technology and ways people use it.



### What makes a successful inbound program?

## You must understand who your clients are (or at least who the clients you'd like to have are)

While seemingly obvious, this is one of the biggest downfalls when it comes to firms implementing an Inbound strategy. In order to reach the clients you'd like to have, you've got to understand who they are, their pain points, their motivations, and what keeps them up at night. Without that knowledge, and without a fullydeveloped persona of each type of client you are looking for, your message will just be white noise in a sea of white noise.

## You must provide valuable content in order for people to pay attention to it

This generally happens in a blog because it's easy for people to consume at their leisure, but it can be video, or any number of other types of content: white papers, eBooks, infographics and so on. The take away is that there has to be value to your prospective clients and their specific pain points. Gone are the days of getting in their face and forcing them to listen – and that's a good thing. Attract them with something of value.

## You must promote that content so your intended readers can find it

This is where social media shines...and it is its proper use for your Inbound program. By going back to your personas, you can get a good idea of where your prospective clients are likely to be and center your social outreach around that.



#### You must be able to be found by search engines

And that is SEO in a nutshell, right? SEO needs to be built into all of your efforts – from your web pages to your blog posts. Understanding, finding and correctly utilizing keywords is a big step toward getting you to that goal...so start there, and make sure that what is produced is SEO-optimized.

#### You must be able to collect data about serious consumers of your content

Going back to content, you will need to have some pieces of premium content – that is content that goes more in-depth and adds more value that you will give away in exchange for some information. In order to make this exchange, you'll need Calls To Action, customized forms, and landing pages. And while this sounds daunting, it is an absolutely crucial part of Inbound. Without it, you aren't able to have a meaningful dialog with people who are actively looking for information and need your help. Without this piece, the rest of it will produce minimal results at best.

## You must be able to have ongoing, meaningful and informative interactions with prospective clients

This is going to require what's known as an email nurturing campaign. Which is another way of saying that those people who have reached out to your firm for premium content may not be ready to have an educated conversation about their needs, pains or goals. So periodically, or as determined by other criteria, you'll be able to reach out to them directly to share information or data that will be helpful to them. This keeps an informal, yet beneficial dialog going until they are ready to have a more in-depth conversation. Remember, it's about allowing consumers to interact with you the way they want. This gives them more opportunities and more education, both of which are good for your firm when a conversation does happen.



We've talked about philosophy, necessity, and the nuts and bolts. The one last thing to know in order to have a wellrounded understanding of Inbound is its methodology. All of the parts exist to address a specific segment of your client's journey with your firm – taking them from strangers all the way to evangelists (referral givers). The diagram below, developed by our partner company HubSpot, does a fantastic job of simplifying what that journey looks like:



### Steps you can take right now

Inbound is an incredibly effective approach that is by far preferred by prospective clients. It's tech-centric, and rooted in how things work now with an ever-present eye on the horizon to make adjustments when needed. But what it isn't, is simple to throw together without experience and expertise. That being said, there are a number of things you can do right now on your own to get your firm primed for Inbound, and quite possibly show some results on their own.

- If there is one thing that is absolutely critical for any Inbound program, no matter how it's set up or who it's for, it's getting those personas down. The very first thing you can and should do is go through persona exercises so you can understand what your clients' true pain points are and what really motivates them.
- **Get those social accounts open**. Not all of them (there is a new one every five seconds). The social platforms you use, and how you focus your efforts on them, should be dependent on what you've learned about your prospective clients through your work on personas. That being said, the first places to look are LinkedIn, Facebook, Twitter and if you have video, YouTube. Google + is still around (for now) and it's always a good idea to be on Google's good side for the sake of SEO.
- Get your website set up to host a blog. If your firm's blog is set up on a different URL, move it over to your home domain. This is not only more useful for readers and increases their overall time on your site, but it's crucial for improving your overall SEO standing.
- Start developing some premium content offers based on your personas' needs.

The steps above are straightforward, but lay a crucial groundwork for the future of your firm's business development, revenue growth and securing of your client base. Best of all, you can begin implementing this right now, today, and on your own.



## <u> Part 3</u>

### Sealing the deal with a superb pitch

By Ray Meiring, CEO of Qorus Software

Now that you have built up a good reputation in the media and used inbound marketing to attract and then build relationships with prospective clients, it's time to seal the deal by delivering an outstanding pitch.

It can be tempting (especially if you have a pitch automation system) to simply generate a standard presentation, quickly personalize the content at a superficial level, and then glance over it on the way to the pitch. I mean, you've given the same pitch a million times now right?

I hope not. If there's one thing I have learned, it's that clients know when you've fobbed them off with a 'standard' pitch that everyone gets. It's boring as hell – for you and for them. Yet we still do it, because it feels safe, and because for some reason it's accepted.

If you want to increase your chances of winning that new business, you need to turn things around. Sure, you need to present your credentials and experience, but what you need to do first is show that you understand the prospect's business and challenges. You also need to show that working with you will make life easier for the people you're pitching too.

In short, you need to take the time to do your homework so that you can make your pitch less about you and your firm and more about your prospect and their challenges.

It all boils down to preparation.

There are three elements to successful pitch preparation:

- Gaining unique insight into the problem so that you can shape your proposition accordingly
- Collaborating on the pitch for an output that is well-rounded and bigger than the sum of its parts
- Do so efficiently, so that the quality of current client work isn't compromised

## Gain insight – think about the *problem* before you start thinking about the solution

If you're unlucky enough to be pitching competitively, you'll need to work out exactly how best to position your firm against others. But even if you aren't, you should always start by endeavoring to understand the prospect's problem. Only by truly understanding the problem can you have a hope of helping to solve it.

We could all learn something from the famous writer Rudyard Kipling, who wrote:

"I have six honest-serving men They taught me all I know I call them What and Where And When And How and Why and Who"



It often helps to apply this technique to your situation by asking the following questions before putting your pitch together:

- What is the biggest problem this prospect is facing?
- Where is it happening?
- When is it happening?
- Why is it happening?
- How can your firm help overcome the problem?
- Who needs to be involved?

Taking the time upfront to define the problem clearly will save you time later on, give you confidence during the pitch, and will hopefully be refreshing for your audience.

Get to first draft stage quickly – so that you can spend more time tailoring

Once you have a clear idea of what the problem actually is (a scoping call is one way to extract some new insights), you can start to shape your pitch.

Pitch automation can be immensely valuable here, as it's great for getting you to first draft stage quickly – giving you more time to tailor and personalize. Unfortunately, I still see too many companies using the system to generate a standard presentation that only receives very minimal tailoring. What a waste!

"Some sections of your pitch will need to be boilerplate, but as much as possible should be fresh content tailored to the company in question."



#### Collaborate – make it easy for the right people to get involved

When it comes to tailoring pitch content, collaboration is vital. Unfortunately, the people who have the knowledge, experience and expertise to translate the insights you gathered into a compelling pitch don't usually work in the marketing department. They're more likely to be fee earners – which means that they're busy.

#### Streamline the process – how automation can help

You might be thinking that this all sounds well and good (obvious even), but the fact is that there just isn't enough time to do it all. Aside from the fact that there's never enough time to prepare sufficiently, there are too many bottlenecks.

You need to find a balance between spending days and days working on a pitch, and accepting the fact that these documents on their own are never enough to secure success.

Automating parts of the process, including notifying various stakeholders that they need to review content, and even enabling lawyers to assemble their own (Marketing-approved) pitches will save a huge amount of time.



#### During the pitch itself

A lot of advise has been given on how to make the most of the small window of time you're given to present your case to your prospect.

#### Best practice includes:

Having the right people in the room. Select the most appropriate partner to lead the team, and make sure that the people who will actually work with the client on a daily basis are there too. That said, make sure that everyone who's there has something to contribute.

Talking about the pitch, and having at least one practice run. The last thing you want to do is look like a team that never actually works together. Take an hour or two to run through the agenda and decide who will cover the various sections. And then practice, whether everyone practices together, or you go over your own sections in private. Practicing will help to combat nerves and make sure that you sound more natural on the day.

**Tuning in to your audience.** Leave enough time for questions, read body language, make eye contact. Avoid the urge to push through what you have to say as quickly and forcefully as possible, try instead to create a conversational tone. Use the kind of language the prospect uses (that research you conducted in the early stages will come in handy here) and avoid lecturing or patronizing your audience.



Avoiding death by PowerPoint. Do you really need to have every line of your pitch documented on slides behind you? Try to mix it up by replacing as much copy as possible with visuals that get the same message across. Or even better, try to scrap the slides altogether and leave a beautifully printed pitch book behind instead.

And, of course, when all is said and done, you'll need to follow up. Send any additional documentation over to the prospect, respond to any queries as quickly as possible and, if your firm wasn't successful, make contact to find out why not and thank the prospect for the opportunity to pitch.

This might all seem a bit simplistic, but a successful outcome is (usually) the result of a combination of three things:

- It being clear that you know the prospect's business and challenges inside out.
- It being clear that your firm is better than the competition.
- The sense that your team will work well with their in-house peers.

If you can get all three right, then it's pretty much a done deal (assuming, of course, that it is business that your firm stands a reasonable chance of winning in the first place).





To discuss any of the insights or opinions in the eBook, feel free to contact the authors on the details below:

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We hope that you found the content of this eBook valuable. If you would like to contribute to the 2016/2017 edition, please contact Taryn at

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