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A Seven-Step Framework for Developing Business

By Stewart Hirsch

Lawyers are always seeking ways to get more business. Having a framework to approach business development may help. Here is one I have used and enhanced with my coaching clients for the last 15 years. Although some specific activities have changed—since social media developments and increased competition—the basic approach remains the same.

1. Set Goals

If you don't know where you are going, how will you get there? Here are some examples of common business goals that many of my clients have:

a. Strategic (firm and individual growth, learning and development)
b. Hours (billable, investment, administrative)
c. Financial (revenue, expenses)
d. Business development (numbers of new clients, meetings with existing, potential and former clients, calls, networking meetings and events, referral sources, LinkedIn contacts)
e. Marketing (writing articles and blogs, speaking and webinars, leadership roles in groups and community)
f. Personal (family, exercise, hobbies, community)[1]

Decide on your goals, and don't be afraid to have some stretch goals, such as starting a blog, or speaking regularly, or spending 5–10 hours a week on business development meetings and calls.

2. Create and Implement a Plan

Goals are not the plan of how you are going to get there: they are what you are working to accomplish. A plan includes specific activities needed to accomplish your goals. It also includes a timetable and critical success factors needed to achieve the goals.

For example, a plan to talk with a specific person might include how you will approach that person, and when. It could be a call, an email, a letter, or coffee together. The precise way you connect will depend on your relationship with that person, his or her availability, and your objective.

To implement the plan, you may want to create some accountability. A person who is serious about losing weight may join a weight loss program, hire a personal trainer, or find another way to hold him or herself accountable. Accountability can be internal or external. For example, an assistant can ask you daily if you made your three networking calls that day. Or you can report to an outside coach, who can hold you accountable, plus help you find ways to connect with people when doing so is outside your comfort zone.

3. Set Priorities

All too often, what is uncomfortable goes to the bottom of the pile. However, if you want business, you have to put business development toward the top of your action items (see #7 below). In my article "When Should Your Client Take a Back Seat," I note that you have to put yourself and your needs on your to-do list. And you have to act on that list. Client development is one of those items. If client work does not have to be completed until tomorrow, and there is enough time to do it later today, then don't blow off a networking lunch simply because there is work on your desk. Prioritize yourself as if you, too, are a client.

4. Persevere

Getting clients can take time. Too often lawyers have the expectation that clients will sign the retention letter soon after a meeting, and then get disheartened when it doesn't happen right away. You should not expect work to come in, on your schedule, just because you need or want the work.

Several things have to be in place before you are retained.

a. Your prospect has to have a need for legal help
b. You (or your firm) have to have the right skills
c. You have to be the right person (chemistry, just like in dating)
d. You have to be in the right place at the right time (some luck involved with that)
e. If the potential client has another lawyer, there has to be a good reason to switch or to give some work to you

Bear in mind: don't make the fact that you need or want work your potential client's problem. Don't give up simply because it is not happening soon enough.

5. Get Access to People

There are debates about whether people hire lawyers or people hire firms. The first operative word here is "people." People do the hiring. So if you already have a large network of people, terrific. Get to know them better. If you do not have a large network, then it's time to expand. In either event, connect with people through these or other means:

a. Alumni activities
b. Community/religious activities
c. Networking events
d. Social media, including LinkedIn, Facebook, and even Twitter
e. Contacts and referral sources

6. Recognize Opportunities

Lawyers often share that they have had a lot of lunches and no business to show for it. Why? Usually because they are spending their valuable connection time talking about what they do, rather than listening to the other person, and thinking about how they can help that person.

Have the right attitude—an attitude of caring and curiosity. Think about people you genuinely care about. Likely you are listening to them, and thinking about ways to be helpful to them. Your natural curiosity helps you to ask questions to learn about them. In the course of conversation with referral sources and potential clients, opportunities arise. But if you're talking or not focused on them, opportunities can be missed.

With referral sources, the opportunities include introductions you can make for the other person, or that the other person can make to you. Opportunities can also include valuable information you can share with each other. With clients or potential clients, opportunities may arise in the form of problems they have that might need your help, or the help of a contact of yours. Be open and willing to connect your contact/referral source/client to the right person. It's not about you.

7. Take Action

There are three parts to this. First, set a next step. Second, look for ways to help the other person, and then do it. Third, follow up.

a. *Set a next step.* Whenever you end a conversation—with a referral source, potential client, even a new person you meet—set the next step to continue the conversation. This includes when it is time to "close" on the business. It's simple. Just ask: "What's the next step?" Or, "Where do we go from here?" Or, "Are you ready to proceed?" Closing is not a goal—it is simply a next step in the process.

b. *Freely make connections, share ideas, and be helpful.* This is the action step after recognizing an opportunity to help someone. With a potential client you could follow the maxim from Charles H. Green, coauthor of *The Trusted Advisor*, who wrote, “Sell by Doing, Not by Telling.” It is better to show people what you do rather than say how great you are.

Don’t hesitate to connect quality people to each other. Yes, you may be concerned about making a referral to someone you don’t know well. If so, and you believe that person may be the right professional for your contact, then just be honest and suggest that the contact obtain references.

c. *Follow up. Always.* How many people have you met at events, truly wanted to contact, or connect with LinkedIn, and then fail to do so? Ever been on a date where one person says “I’ll call,” and then the call never comes? Not following up can result in being considered unreliable. It also pretty much assures that you will not get the benefit of the contact you made. Plus, you lose the opportunity with the connection you forgot to call or email. For some additional thoughts on following up, and what to do when you realize you failed to follow up, see "Relationship Building: Continuing the Connection," an article I published in the ABA *Law Practice Management Journal* in 2002.

These seven steps are a framework. There’s more of course. Put this approach into action with whatever you’re doing now, and it will help you bring in more business.

Endnote

1. While this is not business, it is important to remember you are a whole person. Taking care of you prevents burnout. Think “put on your own mask before assisting a child with his/hers.” More on this in #3 ("Set Priorities").

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