

## SALES SPEAK

## 'Pitch Meetings'

*To Present or Not to Present: That Is the Question*

By Bruce Alltop

The firm's business development plan is in place. Strategic targeting is complete. Contact with the first target has been made. A meaningful value proposition has been shared. Interest by the target has been expressed. *Et voila!* A "pitch meeting" has been scheduled. It's at this very moment that things tend to go off the rails related to conducting a successful introductory meeting with a potential target (prospective client).

#### WHAT'S WRONG WITH A PITCH MEETING?

Referring to this introductory session as a "pitch meeting," quite simply, points us in the wrong direction right out of the gate. At best, the term "pitching" conjures up the vision of a well-groomed professional in front of a roomful of executives dutifully executing a well-rehearsed presentation.

This particular vision causes the pursuit team to think the wrong way about how to prepare for, and then conduct themselves in, this very important meeting. It causes the team members to think about putting a great presentation together and delivering a good show.

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## How Women Lawyers Can Chart a Different Course

By Kimberly Alford Rice

For all the chatter, studies, and disheartening stats we read on where Women in the Law rank in the legal services sector, I say "phooey." Yes, the numbers stink; yes, there are real barriers, discrimination, disappointing treatment from law firm leadership, but hey, we are women "with a capital W," as the phrase goes.

Though I am not nor ever have been a practicing attorney, I have also carefully and strategically navigated the career slalom among my male counterparts in the sense that I am usually the only woman in the board room; have been perceived as a "trouble-maker" at times when I preferred to regard my role as a "positive change agent" and have proactively spoken out for and against a leadership decision when I sensed it was misguided.

My mantra is: If a woman (lawyer or other professional) is committed to creating the career of her dreams, she will, with some support and help from her friends.

Below is a checklist for your journey to help you stay on track:

#### 1. KNOW WHO SUPPORTS YOU

Recognize the value of getting the "right folks" on the bus and those who must get off. For a host of reasons, not everyone will be a supporter. Just know that and keep moving forward in executing your plan for reaching a "happy place" in your professional life. There are the doubters, the second-guessers, the jealous ones, and generally those who want to stand in your way. Utilize your astute intuition and clear the path of those who do not totally support you. You'll pick up valuable others along the way.

#### 2. GET AND STAY FOCUSED

Of course, it is too easy to lose focus when creating the ideal professional life, just because of how everyday life steps in the way. That is one of the reasons why it is imperative to develop a strategic plan for your goals/objectives each

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## Women Attorneys

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year (with reasonable deadlines and measurable metrics).

### 3. ENLIST A PROFESSIONAL COACH

Referring to item #2 above, the probability that you will stay focused and execute with any great consistency and persistency exponentially increases when you engage the services of a professional coach. When we build the accountability factor into the mix, everything about creating your ideal professional life experience works better. Care enough to invest in yourself, and seek out this critical resource.

### 4. CARVE OUT A NON-CONFORMIST ROLE

Because there are way too many paths to a fulfilling career besides the traditional one, should you seek another path that will work better for you? What do I mean? Well, if commuting time consumes too much of your work day, propose that you work at home (or closer to your home) at least one day per week.

If childcare concerns are always looming, propose and/or create a different situation. For instance, on Mondays and Wednesdays, you leave the office by 2:00 p.m., knowing you will jump back into your work once you have your children at home and settled. There are many ways to “skin a cat,” as the saying goes. Just be prepared for your fellow female colleagues to be envious of your courage and assertiveness

**Kimberly Alford Rice** is Editor-in-Chief of this newsletter and Principal of KLA Marketing Associates ([www.klamarketing.net](http://www.klamarketing.net)), a business development advisory firm focusing on legal services. As a law marketing authority, Kimberly helps law firms and lawyers develop practical business development and marketing strategies. Additionally, she provides career management services to lawyers in transition. Reach her at 609-458-0415 or via e-mail at [kimberly@klamarketing.net](mailto:kimberly@klamarketing.net).

in making this work for you! It will likely happen.

### 5. BECOME A MASTERFUL TIME MANAGER

Yep, as women, we often wear too many hats. To stay focused and invest the requisite time to create the professional experience you crave, you must assess and evaluate on an ongoing basis: “Is this worth my time?” Often, we can outsource some of the tedious tasks of existence such as personal errands and car pools.

There are plenty of virtual personal assistants who would be delighted to take your errand and shopping lists right off your hands. There is literally a service for almost everything you can imagine: online grocery ordering; pick-up/drop-off dry cleaning and shoe repair services; housekeepers who offer cooking/chef services; lawn services and landscapers; and so forth. Do not cling to the “I can do it all” or “I really need to do that” mentality if you are committed to creating your dream professional life, which likely includes building a prosperous client base. Tough decisions need to be made and you are the one to make them.

### 6. DELEGATE LIKE A ‘BIG GIRL’

Referring to the popular phrase, “put on your Big Girl panties and just deal with it,” my version is “put on your Big Girl panties, and delegate it.” Similar to item # 5 above, the world does not need any more martyrs and controlaholics who feel they must control every aspect of their lives. Let’s get real for a moment. Something has to go if you are intent on charting a different course for your life. Take a hard look at where your time goes, and find sources to whom you can delegate. Must you prepare a full dinner every night? With a little tutorial, could anyone else in your household prepare dinner at least once per week? How about creating incentives to entice the proposition? There are so many ways to re-claim some of your valuable time that it would be useful to invest the time and access the resources for doing it.

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## E Pluribus Unum: How to Think Like A Lawyer in the Crowd

By Matthew Tollin

I was giving a presentation at the annual LexThink.1 conference at the ABA TECHSHOW this past year when an attorney approached me afterwards and said, “Don’t use the term *crowdsourcing* in regard to the practice of law. It cheapens what we do. Some things just don’t lend themselves to certain technologies.” I wanted to write an article to highlight why I think this is absolutely untrue.

### CROWDSOURCING

Crowdsourcing is the practice of obtaining needed services, ideas, or content by soliciting contributions from a large group of people, and especially from an online community, rather than from traditional employees or suppliers.

The definition above comes from Wikipedia, the crowdsourced online encyclopedia that has forever disrupted the encyclopedia and general publishing markets. In their own words:

“Traditionally edited general encyclopedias have been displaced by Wikipedia, the free, non-profit, community-edited online encyclopedia. Former market leader Encyclopædia Britannica ended print production after 244 years in 2012. Britannica’s price of over \$1000, its physical size of dozens of volumes, its weight of over 100 pounds, and its update cycles lasting a year or longer were all annulled by Wikipedia. Microsoft’s Encarta, a 1993 entry into professionally edited digital encyclopedias, was once a major rival to Britannica but was discontinued in 2009. Wikipedia’s lack of price,

**Matthew Tollin** is the CEO of wire-Lawyer, Inc. He can be reached at [matthew@wirelawyer.com](mailto:matthew@wirelawyer.com).

unlimited size and instant updates are the primary challenges for profitable competition in the consumer market.” See <http://bit.ly/1o5FvQs>.

Similarly, the traditional practice of law is being displaced by newer cloud models of research and collaboration. I would argue that the practice of law has always been a crowdsourced endeavor. That’s why solo practitioners, without technology, formed large firms for hundreds of years. That’s because we innately know that the crowd is smarter than the individual. It’s in our DNA.

### SWARM INTELLIGENCE

Swarm intelligence (SI) is the collective behavior of decentralized, self-organized systems, natural or artificial. SI systems typically consist of a population of simple agents interacting locally with one another and with their environment. The agents follow very simple rules, and although there is no centralized control structure dictating how individual agents should behave, interactions between such agents lead to the emergence of “intelligent” global behavior, unknown to the individual agents. See <http://bit.ly/1pcEymQ>.

Yet there's something in our American DNA that loves the hero myth of the individual. And I find this myth nowhere more pervasive than in the legal profession. I think it's because we attorneys feel like there is something inhuman and unintelligent about technology. I — as the professional — have spent years and copious amounts of money training my brain to “think like a lawyer.” How can a computer compete? Well ... when Deep Blue beat chess champion Garry Kasparov in 1997, that way of thinking was retired, and a dot.com revolution ushered in a whole new global way of thinking. I truly believe that lawyers fear being made obsolete by technology in the same way that robots and outsourcing have decimated the American manufacturing economy. There’s a new nervousness scratching somewhere at the back of our

collective legal brains. That’s a dangerous way to view technology.

### CLOUD COLLABORATION

There is a great deal of talk lately, especially at conferences like LexThink.1 and Reinvent Law, about disrupting the legal profession. I believe such disruption is here and it comes in the form of online cloud collaboration: attorneys working across the globe, collaborating with each other in real-time on documents and motions. This represents a new era of rapid and effective advocacy. Cloud collaboration lowers costs and produces more intelligent documents.

Let’s examine some facts:

- Fact: Over 40 million singles in the U.S have tried online dating.
- Fact: One out of five relationships starts online. Whether it’s on Facebook, Twitter, a mobile app, or traditional online dating sites, there are a lot of success stories.
- Fact: You can meet people outside of your geographic area and social circle with similar interests. You’ll meet more people, so you can learn what you’re truly looking for in a date, mate, or relationship.
- Fact: It's efficient and available 24 hours a day.
- Fact: Many sites provide matching tools and send you e-mails of suggested matches to make it easier for you to view potential dates.

See <http://huff.to/1koEeRq>.

I know that these facts relate to dating, and have nothing to do with the practice of law. But 10 years ago, how many of us said we would never, ever try online dating? And now Tinder, OK Cupid and Match.com have become a very natural part of the social fabric.

Is embracing crowdsourced platforms for love more acceptable than crowdsourcing business? I would say it’s infinitely more difficult to gauge sexual chemistry online than professional merit. Also, a big flaw

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## Crowdsourcing

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in viewing technology is that it has to displace real-world interactions. You can meet someone online, learn something from the ample data about them there, and then meet them again offline. In the dating world, that second part is mandatory. In the legal and professional worlds, it's often not. You can find work online, earn money online and never have to meet in person. If you feel you do need more intimate contact with a potential business partner then the option to meet in person is always there.

Crowd technologies and transactional platforms facilitate real-world interactions rather than replace them. So now you can meet other lawyers online — perhaps in remote locations — and benefit from their insights. Learn about them. Read their reviews. Examine their work-product. And then invite them to coffee. You will know that person much better than if you met him or her traditionally. It's happening on Elance every day. It's happening on Behance every day. And, hopefully, it will begin happening with lawyers online every day.

In fact:

- Elance (now Elance-oDesk), the crowdsourced workplace for engineers, has processed over \$1 billion in transactions since inception.
- AirBnB, the crowdsourced hospitality site for excess real estate inventory, has recently been valued at \$10 billion (bigger than Wyndham Resorts or Hyatt Ho-

tels), minting the first billionaires of the sharing economy.

- Lending Club, the crowdsourced consumer lending platform, has processed over \$4 billion in loans, and paid out \$300M-plus in interest at higher interest rates to lenders and lower rates for borrowers than traditional banks.

The online revolution in data, transparency and collaboration is passing many lawyers by. That's too bad when the practice has become more competitive than ever. SMLs (small to mid-sized law practices) account for 80% of attorneys, 55%-60% of revenue, and over 90% of legal matters. They are trending upward rapidly and giving rise to the need for new business models.

Traditionally, Big Law offered the advantage of working with lots of smart people and accessing great document databases. This can be summed up in one word — resources. Today, technology can afford SMLs the same resources, and allow them to act more like businesses a thousand times their size. By leveraging crowdsourcing technology, SMLs can prove that Small is the new Big. This is creating a bold new crop of more entrepreneurial solo practitioners, and it's increasing access for small businesses and consumers to much needed advocacy.

We should embrace this more than ever. Not because I say so. But because our DNA does.

### OUR COLLECTIVE DNA

You are genetically collaborative — even when it hurts you. Your DNA is crowdsourced, and

the American hero myth of the individual should be put away forever because s/he never existed. A more American idea is that we believe in our deepest heart of hearts in collaboration. The heart of democracy is that government is more just, better, smarter, through collaborative selection. The heart of capitalism disdains monopoly at its roots. We believe the collaborative market with many participants is better for consumers than one individual operator. Opening the practice of law to the crowd opens us up to better advocacy. And advocacy is the basis of every institution just described.

### CONCLUSION

Crowdsourcing better insinuates you into the global economy. It allows a lawyer in Beijing to create a better document with a lawyer in New York. It allows a lawyer in Madrid to find local counsel in Mexico City. And it's the natural evolution from books to LexisNexis (individual research) to Practical Law Company (curated research) to something that's more novel, more open, more free and more intelligent (crowdsourced databases). If your company is not embracing some form of cloud crowdsourcing product, you are:

1. Losing money;
2. Being less efficient; and
3. Running headlong against evolution.

There is no reason NOT to crowdsource. You can now crowdsource documents, advice, revenue and vendor supplies. It is becoming the foundation of many other industries and is nowhere better suited than in the legal profession.



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## Women Attorneys

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Nearly every day in my work with women lawyers, I listen to how much discontent there is, how stretched women feel in trying to “do it all” and in being held back (often from management) from actually carving their own niche. As I frequently say to my clients, “your career transcends your job.” Some-

times, in order to make a measurable change to our professional lives, radical steps may be required (vis-à-vis changing firms altogether). So be it. Before that, however, I suggest the following:

### 7. INVEST IN YOURSELF

To learn is to invest in yourself. As a lawyer, you will find your way to your special niche, often with a few missteps mixed in. Learning how to present a professional image will

render you much more effective in reaching your targeted audiences (internal clients; supervisors; key influencers; prospects, etc.). Projecting a professional, polished image is crucial to growing into your rainmaker status. Dress the part and soon, it will be yours.

Whatever you know you don't know which may boost your success probability, get about seeking the

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## Google Plus and the Google Digital Footprint

### *Basics and Scope*

By Greg Sutphin

Social networking sites have not only changed the way people interact and communicate, but also transformed the way business is done. They have given businesses a platform to interact with customers, find potential clients, and broaden their audience base.

Not limited to e-commerce, social networks have also influenced service sectors — and the business of law is no exception. All social networking platforms, such as Facebook, LinkedIn, Twitter, and Google Plus are trying to establish themselves in personal as well as business niches.

### **GOOGLE PLUS WHAA?**

What makes Google Plus different and more beneficial for marketing purposes is the fact that it is part of a company that affects the largest digital footprint and brings many Google services under one umbrella. With its unique features, Google Plus is in many ways beyond other social networks when it comes to establishing a digital footprint for attorneys.

While recent news, not directly from Google, might indicate that Google Plus is no longer trying to focus efforts to develop the next Facebook, it is still an important “social layer” (Google’s words). Whether or not a lawyer chooses to create and participate within his or her Google Plus profile, it is critical to be part of the largest and most influ-

**Greg Sutphin** provides digital marketing consulting and online marketing solutions to law firms. Reach him at 610-757-8411, greg.sutphin@getlegal.com, or at [www.linkedin.com/in/gregsutphin](http://www.linkedin.com/in/gregsutphin).

ential digital footprint that Google encompasses.

Since lawyers are slow to use social media marketing to build a reputation and connect with others, Google Plus is a great platform for legal professionals to interact, engage and connect with friends, clients, potential clients and other legal professionals.

The bottom line is that social media (including blogging) increases client retentions and referrals. According to the ABA Tech Survey 2013, 39.1% have retained legal services or a referral as a direct result of legal topic blogging. A tool for online social engagement, Google Plus can amplify blogging efforts by integrating relevant content into the huge Google digital footprint in ways that are not being seen in other social networks.

### **FEATURES OF GOOGLE PLUS**

#### *Hangouts*

One of the most common hurdles faced by lawyers and their clients is regular communication. Google Hangouts is a secure and convenient way in which lawyers can stay in touch with their clients.

With the intense competition for clients online and in general, it is important to not only provide quality in one area of the law, but to also stay “connected” and communicate with existing clients — who are a huge referral source. In this context, lawyers need to reach out to the clients in more than one way and leave no chance for a communication gap.

Video chat by Google Hangouts allows an attorney to talk to a client face-to-face anytime. That means every time you schedule a meeting, you do not have to visit the client or call him or her to your office; you can organize a video chat instead. It not only saves times and effort, but is a great, flexible way for face-to-face interaction that several clients might appreciate. As we all know, legal discussions can involve more than two people. This makes Hangouts even more important, as you

can create a group chat that includes up to 10 individuals. This type of video conferencing can take place without a client having to leave the comfort of his/her home or business. The only thing required is a free Google Gmail account, and the interface is fairly simple to use.

Another benefit of Hangouts is that it allows you to keep track of client-attorney interaction. When a lawyer meets a client in Hangouts, a transcript of the discussion and copy of the video interaction is available in the client-attorney dashboard on Google Plus. So, whenever any attorney needs to refer to the Hangout discussion or revisit some points that were discussed, she can access the video and transcript.

#### *Circles*

Just like Facebook has “Friends” and Twitter has “Followers,” Google Plus has “Circles.” These can include people with whom you want to share particular information, and you can choose followers who can view your posts.

Lawyers can create multiple circles, and categorize people based on the purpose of those circles. For instance, while you can create a circle for your personal friends, you can also create separate circles for your potential client base. You can choose which posts and status updates made by you are visible in which circle, thus allowing unified communication with a relevant group of people.

With Circles, specific content can be shared with people who will be interested in that content. The more engagement you have with your Google Plus profile, the more followers you tend to get, which is good for creating visibility and brand awareness. Interacting with other legal professionals and following legal experts helps in creating a network and building relationships.

#### *Google Plus One*

Google Plus One is a great way to establish your brand by establishing

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## Social Media Scene

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your authority over content. This sharing feature works in a simple way and also helps people in your circles to look for relevant articles on the web. When lawyers are posting articles on their website or other sites, the G+ button below the article allows readers to share that content with their circles. When a user clicks the G+ button, it indicates he or she approves that content, and wishes to share it with others. If anyone from the lawyer's circle searches for a particular keyword, he will see the Google Plus One shared articles relevant to that keyword. The more people share, follow or comment on your content, the higher authority you gain on G+, which is an effective way of gaining trust and respect online.

### Google Plus Communities

Any Google Plus user can easily create and host his/her community on the cloud. The communities can be created as public or private. There are numerous private legal communities that already exist and are broken down to specific sub-categories of the law. This venue is a great way to share ideas and ask questions among your peers in a public or pri-

vate setting. A Google Community is a great tool to help build your reputation among your virtual peers with good content and substantive discussions and feedback.

### Google Plus Business Page

Although not part of an individual Google Plus profile, all law firms should claim or create their free Google Plus Business Page. Why? Google includes "local listings" and Google Plus pages in search results. Whether or not functionality of an individual G+ profile like "hang-outs" or "communities" is used, a G+ business page is one of the most critical Google digital footprint pieces for any business.

Although a G+ business page may not be perceived as one of the "big 3" socials like a Facebook page, LinkedIn business and personal profile or Twitter, the opportunity to grow your business online through a G+ page has enormous potential that many law firms are not harnessing.

Google Plus business pages can be created or claimed for each office location. The page can be customized and updated. It is also the Google property that hosts Google Reviews. Keeping in mind that Google Reviews speak mostly to consumer-based areas of law, 92%

of users read online reviews before selecting a business.

### REVIEWS

Should reviews have any less of an influence for choosing legal services? An attorney and law firm should be aware of what clients are saying about them on the Internet. Users say they will not select a business with a poor reputation. A one-star difference in reviews results in 5%-9% change in revenue, according to the *Harvard Business Review*. There are a few reputation management aggregators and monitoring systems available, such as Demand Force and Reputation.com. GetLegal Catalyst is one that is tailored more specifically for lawyers and law firms.

### CONCLUSION

Based on the ABA Tech Survey 2013, 81% (individual attorneys) now say that they use social networks for professional purposes. Create, engage, and share using tools with the company that still has the largest digital footprint and online influence to date — Google.



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## Women Attorneys

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resources/expertise to learn. There is no problem to which there is not a solution. Be committed and you will find what you need. I promise.

### 8. BUILD YOUR CONFIDENCE

There is no shortage of published studies and reports that document how much confidence women, even educated, highly accomplished women, struggle with the "imposter syndrome" and a general lack of confidence. If this is a problem area, address it head-on. Grab a pal and join a Toastmasters or Improv group, which may guide you to taking small risks in front of others as a way to build confidence. Again, there is no problem to which there

is not a solution. Make a commitment, and so it shall be.

### 9. ASK FOR WHAT YOU WANT

Women lawyers often grapple with asking for what they want professionally. Guaranteed: If you do not ask, you will not receive. What holds you back may be a greater question to pose. What are you afraid of? Does the "perfection syndrome" wearily loom over you? Take a courageous step to answer these questions to move you in the right direction. Check out "Women Don't Ask," an inspiring book by Linda Babcock and Sara Laschever, for additional resources.

### 10. CHALLENGE THE STATUS

#### QUO

How many times have you been shut down with, "this is the way

we've always done it," "no one's ever done it that way before," ad nauseum? Everything is negotiable. Start from that point and confidently state your case. Whether it is a prospective client company you attempt to originate on behalf of the firm or considering the terms of a new employer, remember, everything is negotiable.

### 11. BECOME YOUR OWN

#### ADVOCATE

All too often, women lawyers tenaciously advocate for their clients, their children and families, but not so much for themselves. The next time you need to speak up for yourself and are reluctant to do so, envision yourself as *the client of you*. Go ahead, just consider it.

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## Women Attorneys

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### 12. BREAK OUT OF YOUR BOX

Building a prosperous book of business requires commitment, tenacity, and stepping back to frequently think outside of the box on how to leverage your growing network, your area of expertise and all resources available to you. Carve out some time for yourself, no distractions, no interruptions, on a regular basis to just “be.” This exercise is one of the most powerful when we allow ourselves to be creative, to envision what we truly want from our careers. Some find meditation a productive way to accomplish this state of being. Whatever works, do

it. From these creative thoughts will materialize a marketing plan ... not an anthology, but rather a few concrete steps you can take on a regular basis to cultivate strong business relationships and build a strong reputation in your area(s) of expertise.

As women, we have always had to fight harder, be more resilient, and press more than some of our counterparts. While the professional landscape is creeping forward slowly, let us forge on to meet our professional goals.

I am often troubled to learn that many women attorneys practicing in law firms either proactively decide (professional suicide) or decide by default (no action taken) that, as long as firm partners are feeding

them work, they're good. These intelligent women (and men as well) are fed the “don't worry about bringing in new files” line by firm partners, or they are lulled into complacency as a result of the constant feeding at the trough of the few firm rainmakers. Either way, the long-term career prospects are dim unless these folks somehow have an “aha” moment and realize that increased earning potential and long-term job security is directly linked to developing and growing a healthy book of business of their own. Don't let this be you.



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## Sales Speak

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Presentations should be reserved for sharing technical information in an educational setting.

A “pitch meeting” is not such a forum. A pitch meeting, for lack of a better name, is an opportunity to share information in an interactive setting, to get feedback, and to begin developing a mutually beneficial relationship. If we spend our allotted time presenting, we are spending more time talking and less time listening, which results in missed opportunity.

What goes hand-in-hand with the pitch meeting presentation? Of course, it is the requisite “pitch materials,” right? As we know all too well, pitch materials are commonly referred to as “pitchbooks.” These pitchbooks have been a part of the business development effort at every law firm that I've had the pleasure of working with over the years. Pitchbooks look so similar from

firm-to-firm, it's simply remarkable. It's particularly remarkable because the pitchbook is not an effective business development tool.

If you are a marketing professional, you likely despise pitchbooks. If you are a lawyer, you are likely addicted to them. If you are a prospective client on the receiving end of the “pitch,” I suspect that you have seen more than your fair share of pitchbook-driven presentations over the years. Of course, there may be those who are exceptions to this rule. However, this article is meant for the unfortunate majority and focuses on the ineffectiveness or even inappropriateness of presenting in a so-called “pitch meeting.”

### WHEN TO GIVE A PRESENTATION

Solid presentation skills are important to develop, but there is a time and a place for giving a presentation. As referenced above, I contend that presenting should be reserved for educating or training purposes. A “pitch meeting” is not typically a forum for educating or training, but is a rare and quite valuable opportunity to make a connection with the client or prospective client.

As consultants who provide a lot of training on many topics, we have the opportunity to present to our clients quite often. Even still, we en-

deavor to make these presentations as interactive as possible, so the listener is engaged, contributes to the program, and feels like he/she is part of the teaching process as well as the learning process.

A presentation should not be the concept that comes to mind when preparing for a business meeting with a client or prospective client. “Business” is a key word when it comes to conducting meaningful discussions with clients or prospective clients.

Conducting meaningful discussions is really the heart of this article. It is quite common to see lawyers talking (read: presenting) for the first 20 minutes of a pitch meeting about their law firm and/or their personal credentials without giving the client an opportunity to share their point(s) of view. This is valuable time lost and is nearly unrecoverable.

The lawyer(s) may have demonstrated how proficient they are at remembering when their law firm was founded, how many lawyers are in the firm, how many global office locations they have, etc., but they totally miss the boat when it comes to understanding the clients' needs and, most importantly, making a connection.

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**Bruce Alltop** is a Senior Consultant at LawVision Group, LLC. His experience includes nearly 10 years as a law firm Chief Marketing Officer, and leadership positions at other professional services firms, including Ernst & Young.

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## Sales Speak

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Further, the pitch meeting is an excellent opportunity for the pursuit team (lawyers) to demonstrate to the prospective client what it would feel like to work together. If the lawyers talk about themselves for the majority of the meeting, the prospective client would certainly get a sense of what it would be like to work together with this particular lawyer; and one would likely conclude that the feeling would not necessarily be a positive one.

Business development is relationship development, so it is important to make a connection. To make a connection, we must first think about viewing the world from the prospective client's eyes and engage them in meaningful discourse. To have meaningful discussions with clients or prospective clients, a good place to start might be to first understand their business.

### UNDERSTANDING THE BUSINESS

The most successful rainmakers understand their clients' business; recognize what is getting in the way of their client achieving their objectives; are immersed in their client's industry; have developed the ability to share valuable insights on a topic relevant to the client; is able to engage clients or prospective clients in meaningful discussions; and rarely, if ever, "presents."

The primary focus of a pitch meeting should be to have a meaningful conversation or discussion with the prospective client. During this discussion, the team should be able to clearly demonstrate their knowledge of the prospect's business, including broader industry issues that may be on the horizon.

The team should be laser-focused on the prospect's organization and issues, not on their own firm's fast facts. Talking about issues that are happening in the prospect's indus-

try establishes immediate credibility. If you understand the business issues, then one can only presume that you have been there before. You are in the prospective client's space. You speak their language. You make a connection.

There are a number of ways to gain a better understanding of your client's business and industry. A few examples include:

- Talk to a colleague who may have been in-house counsel at a company in that particular industry.
- Leverage technology tools to track industry issues and trends.
- Join an industry association.
- Ask your clients what industry-specific publication they read; subscribe and read it.

There is so much information available at our fingertips these days. In my opinion, there is no excuse for walking into a meeting and (after the 20-minute soliloquy) asking the prospective client "So, tell me, what is keeping you up at night?"

If you ask this question and they haven't thrown you out of the office, you can be sure that the thought did cross their mind and, in my opinion, they should not have reconsidered. If the right team has been put together, the team should know what the pressing business issues are and should pose more focused questions than the one above.

A simple, yet effective, meeting agenda that will serve as a connection-enabling interactive discussion with a prospect follows:

- Introductions
- What we're seeing (in the marketplace).
- What we know about your company.
- How we can help.
- Next steps.

Following this agenda will establish the team as thought leaders, help the team communicate in business terms, enable the team to make a connection, and will fa-

cilitate learning nuances about the prospect's organization that only an insider could know. Additionally, following such an agenda will minimize the time spent on "presenting."

For example, related to the second bullet above, once insight about market conditions is shared, simple questions can be posed to the prospect that will serve to validate their experience. Nine times out of 10, if you have assembled the right team, the answer will be yes to these drill-down validation questions. Even if the answer is no, an opportunity presents itself for other questions to drill down further which will result in learning more about the nuances of the prospect's organization as mentioned above.

### VISUALS

If you are compelled to bring a document to the pitch meeting, then create a Powerpoint deck with five or six slides and use the bullets above as the meeting agenda. This document can be a helpful roadmap to keep your discussion on track. Additionally, the client is more likely not to throw this document in the trash as she would generic pitch materials along with that glossy brochure that was distributed at the session. Glossy brochures are more impressive to us than they are to the recipients. The pitchbook days are over, but a customized qualifications document that incorporates what you heard at the pitch meeting as a follow-up item is still very much in vogue.

### CONCLUSION

Stop presenting and start having discussions. Instead of presentations, think of pitch meetings as an opportunity to have meaningful discussions to share valuable insights with your clients or prospective clients, and leave the pitchbook behind. You will be pleasantly surprised at the results.



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