

DAILY REPORT

AT ISSUE

In the pitch, the lawyers laid out their plan for the matter. The pitch amounted to an hour of very sophisticated free legal advice. They won the business.



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Want to win new business pitches?

TAKE SOME TIPS from a software salesman on how to sell your legal services

LAWYERS WHO want to deliver effective new business pitches could learn from my friend the software salesman.

My friend—let's call him Hamid—sells accounting software packages for a major software vendor based in California. And as one of his company's top sellers, he's delivered more than his share of winning pitches.

While we lawyers often think that selling legal services is different from selling anything else—especially software—we should heed Hamid's three keys to new-business-pitch success: know when not to pitch, use a discovery period to develop the relationship before the pitch, and focus your pitch on a solution, not credentials.

If an opportunity's not right, turn it down

Hamid's first tip is to know what opportunities to refuse. He told me that whenever his company is asked to pitch, they seek meetings with the key stakeholders and analyze their needs. If the company won't accommodate this request, they refuse to pitch.

"We say, 'No thanks,'" Hamid told me. "We want to build a relationship. We don't sell software. We sell a solution."

Similarly, lawyers should consider turning down certain pitching opportunities. If you're walking into a presentation with no sense of the prospect's true business needs, you probably shouldn't go.

Similar to Hamid, the best lawyers don't sell contracts and legal briefs; they sell solutions to business problems. For example, an environmental lawyer told me recently that he finds that he only wins pitches when he's had a chance to examine the prospect's environmental challenges and then come in with a solution.

So if you have the chance to pitch, ask to speak to key stakeholders before the presentation. Say, "We want to come to the presentation prepared to show how

we can really be a resource. Before our presentation, we'd like to meet with one or two people to discuss the issues they're facing. Would that be OK?"

If the company is serious about finding a lawyer that will help them, they'll usually be happy to accommodate your request.

Build relationships before the sale

Hamid's next key to winning a beauty contest presentation is using a discovery period to develop a strong relationship with the prospect.

He told me of how he was asked to give a presentation to a high-end mattress-maker. Before the presentation, he spent months learning about the company's accounting systems and how none of the systems "communicated" with each other.

"They had multiple accounting systems, all relying on different information streams," he said. "Everyone was working with different numbers." As a result, no one was able to put together a complete and accurate financial picture of the company.

When lawyers lose a pitch, they often say "the other firm had the relationship."

But that never happens with Hamid. He understands that if you go through a discovery period with the prospect, you're going to understand the prospect's business and build a relationship that leads to business eventually.

Sell solutions, not products

Hamid's final tip is to focus the final presentation solely on solutions to business problems. In the case of the mattress company, he said, "We showed them a fully integrated solution that allowed them to anticipate and plan their business," he said. As a result, he said, "they bought our entire suite of software."

Similarly, lawyers who win lots of new business pitches don't waste time giving

their firm's credentials. They detail legal strategies.

I worked with an attorney who related how his firm won a major bankruptcy opportunity. In the pitch, the firm didn't talk about its extensive bankruptcy

experience. Instead, the lawyers laid out their plan for the matter. The pitch amounted to an hour of very sophisticated free legal advice. They won the business.

Next time you have a chance to pitch for a piece of business, remember what the

great software salesmen do. They don't pitch if they don't get a chance for some discovery on the prospect. They use that discovery to develop a relationship. And then they pitch a solution to the problems the business faces. ☞