

CultureShift®: **A Whole Firm Approach for Driving Growth, Profitability and Revenue**

Presenter:

David H. Freeman, J.D., Founder, Law Firm CultureShift®

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Business Development Planning				
Increase Client Loyalty				
Pursue New Work				
Leadership & Management				

Business Development Planning

- Research – competitive, market, internal surveys
- Analyze internal data
- Firm-wide, by group, by individual
 - Encourage to “Go Big”
- Establish “ownership” responsibilities, goals and measures
- Align compensation with business development goals
- Retreats
- Business development committee
 - Overarching: Marketing, Client Acquisition, Service
 - Associates
- Budgeting
- Lateral integration
- Mergers & acquisitions
- Client succession

Increase Client Loyalty

- Client feedback/annual reviews
 - (Mandatory for “A+” clients)
- Collaborative planning with clients
- Cross-selling (“Cross-serving”)
- Client action plans
- Key client teams
- “Zippering” with key client contacts
- Client service training and standards for lawyers and staff – checklists and measures

Pursue New Work

- Business development skills training and coaching
 - Industry group initiatives
 - Ongoing outreach to top prospects
 - Referral sources
 - Firm alumni programs
- Business development mentoring
- Engage with Marketing/Business Development departments
- Marketing, branding activities
- Alternative fee arrangements/Legal project management
- Ancillary services

Cross-Selling

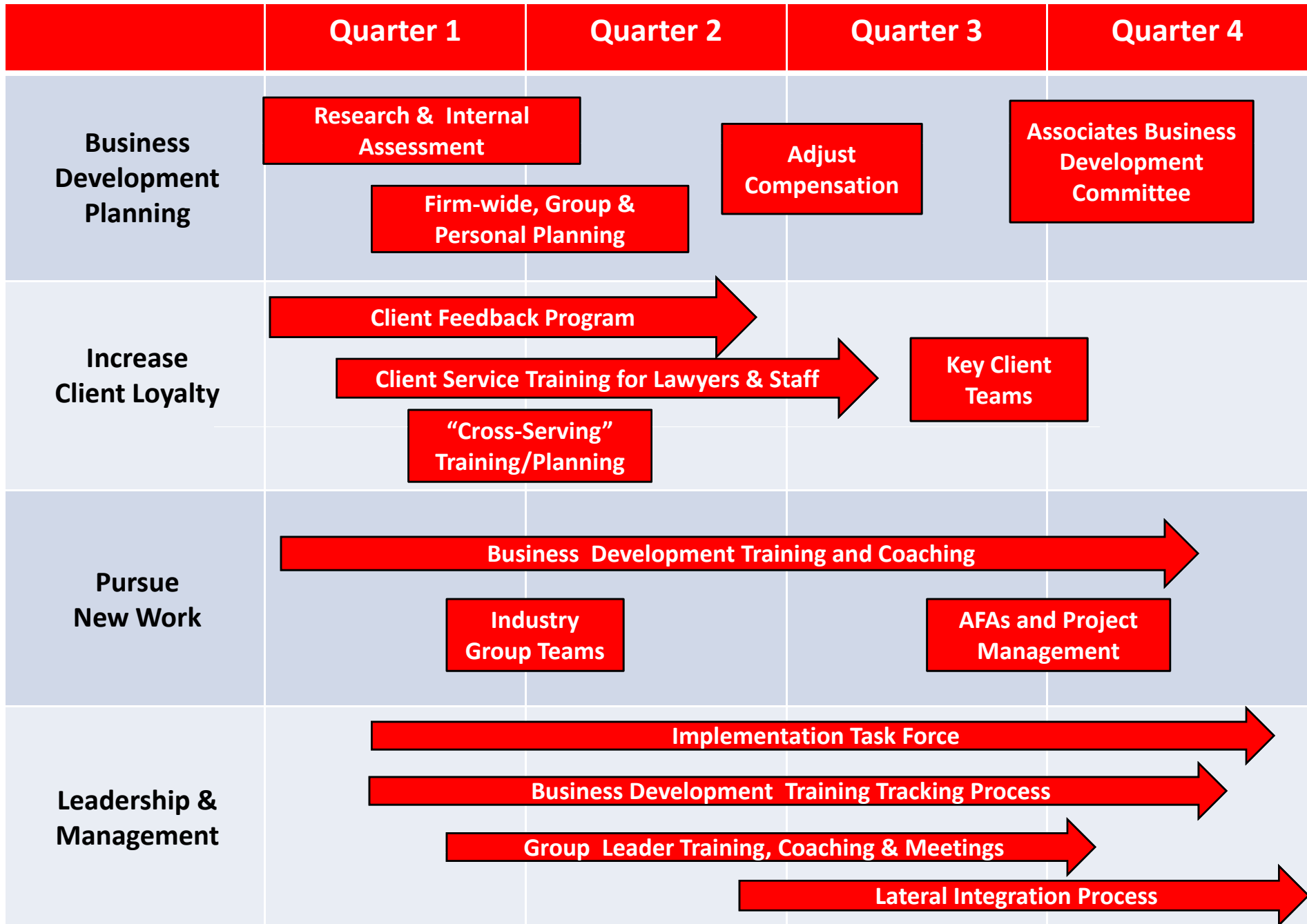
- Reframe cross-selling to “cross-serving”
- Build internal visibility, familiarity and trust
 - Between complementary group leaders, practice groups, dept’s and offices
 - Encourage cross-group education and communicate opportunities
- Provide cross-serving training
- Create a culture of “giving” opportunities – develop action plans for top targets
- Make it easy for relationship partners
 - “Gifts”
 - Identify client’s needs
 - Probing questions
 - Build relationships with clients in advance of their needs
- Ongoing communication of relevant cross-services to clients
- Establish “Watcher” process to drive ongoing activity

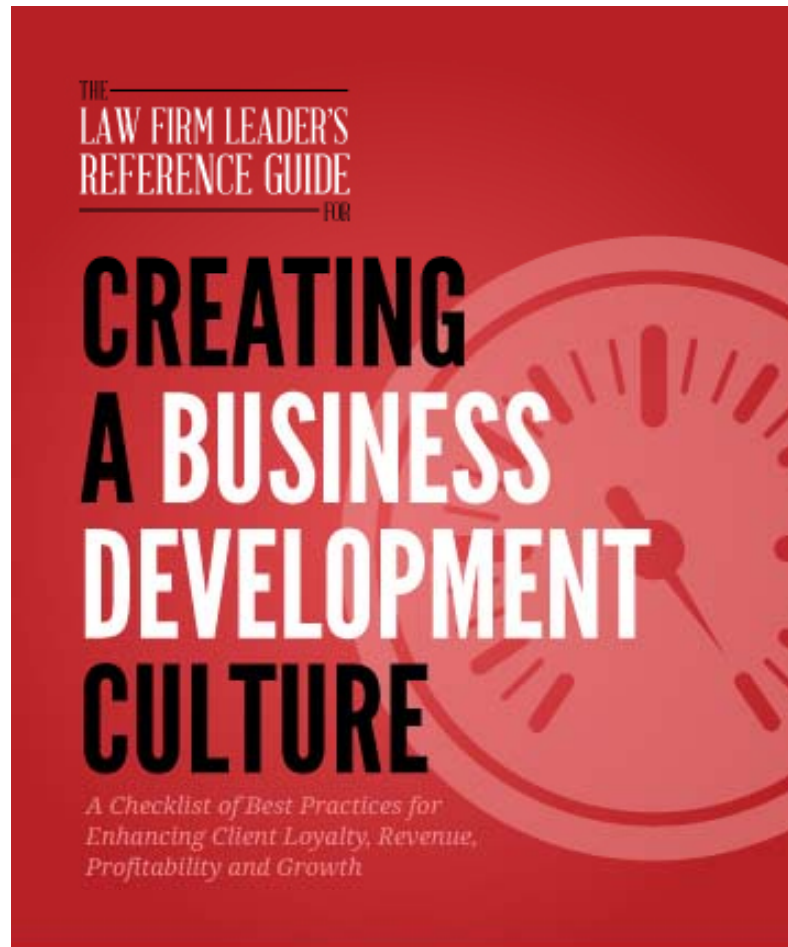
Leadership and Management

- Leadership team planning and ongoing meetings
- Create high performance practice groups/teams
- Run effective group meetings
- Delegate key BD responsibilities
- Group leader “sales management” training & coaching
- Ongoing internal communication
- Establish expectations for ongoing BD activity
- Progress measures
- Encourage lawyer engagement in BD activities
- Incorporate leader’s input into compensation
- Lateral acquisition and integration
- Diversity
- Recognize and celebrate successes
- Walk the talk

Implementation

- Establish individual accountability - “Watcher” role
 - Gain “permission”
 - Utilize collaborative planning processes
 - Establish goals and measures
 - Develop implementation task forces
 - Develop “buddies” and mentors
 - Establish transparent tracking systems with goals, contests, reminders
- Increase lawyer’s understanding of how BD impacts their compensation
- Keep lawyers regularly engaged with BD
- Engage with Marketing/Business Development Department
- Utilize technology





David H. Freeman, J.D.



<http://www.lawfirmcultureshift.com/get-new-book/>

