



# Marketing

## *The Law Firm*<sup>®</sup>

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### **Spotlight on Innovation**

#### **Q&A with David H. Freeman, J.D., CEO of David Freeman Consulting Group and Creator of CMOplaybook™**

By Elizabeth Anne 'Betiayn' Tursi

**Tursi:** You have been a business development trainer, coach, and consultant to law firms for over 16 years. What motivated you to develop a new approach for developing rainmakers?

**Freeman:** During my career, I have seen many different approaches for improving the business development skills of lawyers - training sessions, personal coaching, "train the trainers," lunch and learns featuring internal rainmakers, mentoring programs, conferences, books, experiential learning, accountability groups, and tracking systems - you name it, firms have tried it. With CMOplaybook™, I have combined a number of these best practices to create an internally managed system that can help lawyers at any level become better rainmakers.

The idea for this program took hold during my tenure as Co-Chair of the Legal Marketing Association's Annual Conference last year. It became clear to me that we collect the best and the brightest to preach to the choir - other legal marketers - but it is the lawyers themselves who desperately need this information. My first task was to collect some of the "greatest hits" in business development, to package the knowledge shared in a conference in a way that is accessible to a wider audience. To that end, I recorded nine sessions with a faculty of 28 Chief Marketing Officers and other law firm marketing, sales, and service experts, covering the key areas of business development. My production team and I then spent hundreds of hours sifting through the recordings to extract the best ideas, with the final result being hundreds of invaluable approaches that can translate into millions of dollars of new revenue over a career.

As you well know, information, without implementation, is never enough. My next challenge was to build an approach that combined adult learning techniques with the benefits of personal coaching in a way that could be delivered and managed internally by a firm. By incorporating action worksheets, business development templates, participant's and leader's guides, accountability groups, and personal sustainability and tracking systems, CMOplaybook™ has evolved into a radically different, self-paced learning and action system that can help lawyers build truly exceptional practices.

**Tursi:** Why does the marketplace need another way to develop rainmakers?

**Freeman:** After all these years, many firms are still asking the same questions: How do we improve our culture of business development? How can we get a larger group of our lawyers to take ownership for generating more revenue? How can the lawyers truly learn and practice skills that will attract new clients, keep existing clients happy and loyal, and grow relationships? How can we make sure our new laterals are well-integrated, stay with the firm, and become profitable investments? How can we sustain business development over time?

I believe the market conditions are ripe for a new approach. In a tough market, lawyers need every edge. They need to learn from many experts, since no single trainer or coach has all the answers. Firms need to stretch their budgets, while reducing their dependence on external resources. I designed CMOplaybook™ to address the key issue behind all of the questions listed above - engaging and energizing lawyers to conduct more, and better, business development.

**Tursi:** How did you develop the curriculum?

**Freeman:** Having trained and coached thousands of lawyers from hundreds of law firms over the years, I have come to understand the major characteristics and behaviors of successful rainmakers. In conjunction with the faculty, we developed these core competencies of business development, which include:

- Building an effective business development plan;
- Developing niche practices;
- Growing networks and staying memorable;
- Obtaining prospective client meetings and maximizing effectiveness in those meetings;
- Cross-selling;
- Delivering exceptional levels of client service;
- Alternative fee arrangements;
- Maximizing presence on the Web;
- Effectively lateraling to a new firm: and
- Developing methods for keeping business development a regular part of one's practice.

**Tursi:** How did you choose your faculty?

**Freeman:** My goal was to assemble a faculty of proven experts who were also highly rated speakers, and I was truly fortunate to bring together such an amazing team. We have a total of 28 presenters, which include Chief Marketing Officers and senior business development experts from AmLaw 100, 200, and mid-sized firms, along with several highly respected consultants and law firm professionals. These are people who spend all day, every day, thinking about ways to make lawyers and law firms wealthy. The synergy among the faculty was fantastic, and you know you've struck gold when the panelists say they learned something from each other during their sessions!

**Tursi:** Who is the audience for this program?

**Freeman:** The hundreds of tips and techniques contained in this personal rainmaking system can benefit lawyers at any size firm. There is also another audience - in-house marketing professionals - that can realize tremendous value from the information contained in this series. As you know, demand is rapidly shifting from marketing to business development. By using this program, in-house professionals can get a crash course and begin to retool their skills.

**Tursi:** What are some of examples of interesting tips that are contained in your modules?

**Freeman:** There are so many it's hard to narrow them down to a few, but here are a few of the highlights. In the session entitled "Developing Niches and Building on Your Strengths," Ross Fishman described techniques for becoming a more prolific writer while saving time. In the same program, Jim Stapleton suggested a wonderful approach for keeping business development sustainable, what he called the "Push-Pull" approach. In this model, at the beginning of a week, one person is responsible for getting the lawyer to make business development commitments, and at the end of the week, another checks up to see how well they performed their tasks. He goes on to explain that by implementing this auditor role, business development activity invariably accelerates.

In the same session, Mary Kimber suggested we can equate business development to a political campaign, noting that it can take nine or more impressions before someone remembers a candidate's name. Our lawyers need to recognize that just as in politics, others are vying for a client's "vote," and therefore they must constantly stay top-of-mind.

In another program on Cross-Selling, Dave Woods offered a technique laterals can use when coming to a new firm. He suggested that new laterals should ask to look at a firm's client list to see if clients are regularly serviced by more than one practice area. If there is not a lot of cross-over, this could be a red flag that the firm does not encourage and support cross-selling, and therefore may not be a good fit for the new lateral. The other panelists, Deborah Grabein and Jonathan Fitzgarrald, also noted that cross-selling occurs most frequently when there are strong interpersonal relationships built throughout the firm. They go on to describe several techniques for building relationships such as traveling to other offices to meet key lawyers, conducting internal webinars featuring specific lawyers and their practices, hosting partner dinners, using marketing staff to uncover new opportunities, extending offers to go on new client pitches, and providing free services to build trust with other lawyers and their clients.

In the module "Growing Networks and Staying Memorable," Bruce Allen shared a powerful business development process he uses that involves building influential private referral networks. He suggested lawyers should invest the time to meet the right people in order to become "the someone that someone else knows." In the same program, Jim Durham shared some interesting research conducted by a Bar Association which noted that approximately 80% of lawyers gave 10 referrals a year and received 10 referrals a year, whereas about 20% gave 50 referrals a year and received 50 in return. Truly striking evidence of the power of giving to others!

Also, in the module on "Social Media, Social Networking, Search Engine Optimization, and Web Sites," Darryl Cross, Russell Lawson, and Heather Morse-Milligan drilled home the message that many of us are missing out on the Internet-based conversations of our prospective clients. They suggested that lawyers should talk to their clients and prospects to learn which social networks they participate in. They recognized how overwhelming the volume of information can be, and one tool for managing time was to watch for changes in status and updates as a way to stay on top of current events.

In all of the programs, we asked the panelists to share their best practices for making business development an ongoing, sustainable habit. Techniques like setting aside a regularly scheduled time, prioritizing contacts, developing buddy systems, are but a few of the many valuable tips they shared in this series.

**Tursi:** It sounds like you've found quite an innovative a way to merge the best of business development, coaching, and a conference into one package.

**Freeman:** I am deeply grateful to the faculty for sharing their knowledge. It is a testament to the collaborative nature of our community that such a highly esteemed group of people would come together in this way to serve our profession. I am very proud of what we have created.

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David H. Freeman, J.D., a former lawyer from New York, is founder and CEO of the David Freeman Consulting Group. He can be reached at [dfreeman@davidfreemanconsulting.com](mailto:dfreeman@davidfreemanconsulting.com) or 949-715-0819. Elizabeth Anne "Betiayn" Tursi is the outgoing Editor-in-Chief of Marketing The Law Firm. It is interesting to note that an article by David Freeman entitled "Rev the Revenue: The Marketing Focused Retreat" was featured in the August 2003 issue of MLF. With that issue, Betiayn Tursi began her tenure as Editor-in-Chief. How fitting that with her last issue, David Freeman is the subject of an interview with Betiayn.

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