

Pencil to Paper to Prosperity

David Freeman's Five Elements of a Successful Client-Development System

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Solo and small-firm lawyers have a lot going on. They're dealing with sales, marketing, client service, quality control and continuous improvement—things lawyers at bigger firms often get to delegate.

Which means there's no room for wasted time, especially when it comes to marketing. And that's where Boulder, Colo.-based professional coach David Freeman comes in. This former lawyer has spent more than a decade coaching professionals on how to maximize client development, and he's come up a system that incorporates these five elements:

Element No. 1: Identify your target market.

Integral to client development isn't just the message, it's also where to send that message. For example, to build a corporate practice assisting small businesses, you need to be out in front of business owners as much as possible. "Find the right organizations; find the publications they read, and write for them; speak where they gather—it's all about building a brand and building a reputation," he says.

Another approach is to market to referrals. One question to ask is, how big is this network? And how strong are your relationships in that network? For example, if accountants could be good referral sources, and you have friends or peers who are accountants, meet with them and ask, "What can we do to help each other?" The key to this element is to increase the quantity and quality of strategic relationships.

Element No. 2: Reach your target market in the right way.

Whether it's through speaking engagements, writing newsletters or offering free consultations, it's all about repetition. "It is a game of 'top of mind,'" Freeman says. He offers this example: "If you meet Sally CEO at a function, and you've had a chance to tell her your elevator speech, and you've handed her your card—that will not get your business. You have to think of ways to stay on Sally's radar screen."

A good way to do this is to offer to let her sample your services. "It could be, you could review Sally's employee handbook, you could come in and talk with her management, you could offer to look over her employment handbook," he suggests. "Anything that will allow her to get an idea of what it would be like to use you as a lawyer."

Then make sure they hear from you again and again, in a way that's both elegant and comfortable. "That's the caveat on the top-of-mind game," he says. "Our contacts have to be valued, welcomed, useful and informative."

The end goal is to become what Freeman calls "a trusted adviser"—someone clients turn to whenever they have problems or need something done, whether it's a legal problem or not. Freeman recommends reading *The Trusted Advisor* by David Maister to become a master of this skill.

Element No. 3: A contact management method.

A contact management database that captures the information that you've gathered from people is crucial, says Freeman, especially one with a calendaring system to tell you when to follow up. Among his favorite? The simple Excel spreadsheet. "Going down the left hand column is all the people you feel like you should be contacting over the year; along the top row are the months of the year," he explains. "Consult this frequently, and you'll be able to tell, 'Oh it's been four months since I've talked to Fred. I should give him a call.'"

Another trick is to categorize contacts—and keep them current. That way, if a piece of information crosses your desk that's of interest to someone, you can easily see who else it would appeal to and can send it out to five people instead of just one. What you don't want to have, he says, is a drawer full of yellowing business cards.

Element No. 4: Set Goals.

Want to make 25 percent more this year? Great, but you're going to need to set more goals than just a target annual income if you want to actually earn that money.

Specifically, you'll need some marketing goals, like "I want to get a leadership position in a leadership organization by February of '08," or "I want to speak before a group by March of '08."

"These are premeasures that will help you get to your target financial goals," Freeman says. Other suggestions for goals are number of on-site visits, number of communications with potential clients, and receiving a certain number of referrals by a certain time. "I would have an annual goal and then break it down to monthly goals—or any other system that works based on your personality, so long as it puts pressure on you to do something," he says.

Element No. 5: Create a system for accountability.

Setting goals means nothing if you aren't actively working toward accomplishing them. "For many, internal motivation isn't enough—they need something else or someone else to hold their feet to the fire," Freeman says. By all means write goals down in your calendar, but Freeman suggests also creating a buddy system to help hold you accountable. That buddy can be a friend, an employee, a spouse or even a business contact—he knows an estate-planning lawyer who partnered with an insurance agent, and every year they'd sit down and coordinate marketing contacts. Regardless, he says, "The reminder is by far the most important piece—anyone can commit to a plan, but getting it done is the differentiator between people who are successful and people who want to be."

Now, be prepared to invest the time to get it done, Freeman says. "There's no other secret than time well-spent."