

## Business & Careers

# How lawyers get and service clients is changing



**Luigi Benetton**  
Hi-Tech

At Cognition LLP, lawyers stick to practicing law while other people play ancillary roles, including sales. This separation of roles “wouldn’t be rocket science in any other industry,” notes founder Joe Milstone.

Jacqueline Dinsmore figures inertia is to blame for many firms obliging lawyers to practice client service, account management, sales, and other roles, in addition to law.

“It’s difficult to change,” she says, “but the industry is forcing us to change,” says Dinsmore, Cognition’s chief development officer and a representative of that change.

A former lawyer, she has worked at a



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major firm and as in-house counsel. She continues to work at the business she started and runs with her family. The

self-described outlier may have the perfect profile for a legal services sales representative.

She doesn’t consider herself a rainmaker. Neither does Peter Carayiannis. In fact, the president and founder of Conduit Law Professional Corporation, doesn’t like the term.

It makes the activity “sound mystical and magical,” he says. “It’s very hard to impart mystical and magical secrets to other people.” Carayiannis says firms need discipline, focus and a plan to bring in clients and Larry Port, CEO of online practice management provider Rocket Matter LLC, agrees.

“Too many lawyers approach rainmaking in a haphazard manner,” he says.

Measurement also matters.

“They need to understand where their prospective new clients are coming from and how much it costs to acquire them.” Port adds.

He notes those costs ought to help determine business development budgets.

To help him create his plan, Carayiannis adopted a business development paradigm consisting of client “touch points” spread across a spectrum.

**Carayiannis, Page 26**

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## Business & Careers

# Carayiannis: Twitter return on investment 'is massive'

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"The moment of client acquisition is in the middle of this spectrum," he explains. "To the left of that moment is all the funnel work of identifying prospects and bringing them along to the point where they hire Conduit. To the right of the moment of acquisition is servicing and keeping the client."

Dinsmore found statistics that point out a mistake companies often make. Those numbers showed 80 per cent of sales happen between the fifth and 12th contact, yet only ten per cent of salespeople reach out to prospects more than three times.

She understands lawyers don't want to pester prospects, so she advises they space out their efforts over time. She also proposes making each contact relevant.

She might say to a client: "You mentioned a year ago that you were having trouble with leasing. At that time we didn't have a fit. Well, we just hired three lawyers with leasing experience. We thought you might be interested. Here are their bios."

Tools for customer relationship management can help. Dinsmore uses Capsule,

Cognition's customer management tool, as a place to track contacts she's had with clients, current and prospective alike.

Monica Goyal has looked at such tools for Aluvion, the seven-lawyer firm she founded. She used Salesforce in a past business.

"I haven't found that it's a good tool for legal," she says, noting both the need for a dedicated salesperson and that most businesses underutilize it. She prefers to use a lower-tech reminder system that ties in to her email system.

Carayiannis started his firm using a low-tech system he cobbled together using Microsoft Outlook and spreadsheets. He's since taken his firm to online practice management system Clio.

He also works on smoothing out the middle of the spectrum. "If you're about to sell, then you put a big stack of paper in front of the client to sign, it creates an impediment."

He acknowledges the importance of that "stack" so he uses Lexicata, another cloud-based service that he connected to Clio, to make the process as painless as possible for clients.

“

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Jacqueline Dinsmore  
Cognition

Effective websites can lead prospects up to the buying moment. Port says they do so by both confirming lawyers are competent and enabling business development. Sites need to do things like guide prospects effortlessly to screens where they can and will submit information. They may even integrate into a workflow for customer relationship management, so website visits become "actionable."

Social media can affect points across the spectrum, but it can pay off when it brings more prospects to it. Goyal concentrates her modest social media efforts on the "big three" of LinkedIn, Twitter and Facebook.

"If you're going to be on these platforms in a significant way, it's a time commitment," she says.

"I enjoy Twitter, so that is not a work thing. As a tool to develop business for a lawyer, I don't think it's very effective."

Carayiannis disagrees. He claims his

Twitter account is the one marketing tool he would never dismiss. "It's not so much that we've generated a tsunami of work from Twitter, but the ROI on Twitter is massive. It doesn't take a huge investment in time to establish an online presence, an online voice. And to become part of whatever community you want to join."

Dinsmore uses her LinkedIn premium account as a research tool.

"No call should ever be a cold call," she insists. "The legal world is much smaller than you think. I can usually find connections to in-house counsel decision makers in some way."

Live encounters may serve as the most potent way to create relationships and sow the seeds of future business, but lawyers can't hope to reach everybody they've ever met this way.

That's why many firms publish newsletters. Port calls these "drip campaigns" that lawyers use to send a regular "heartbeat" to remind people they're around.

Sophisticated email newsletter platforms like Constant Contact and MailChimp simplify the repeated tasks involved in drafting, laying out, publishing and sending email newsletters. Goyal notes that the major platforms let lawyers stay compliant with Canada's Anti-Spam Legislation (CASL).

Business development coach Gary Mitchell goes further than Goyal. "The newsletter is dead," he states. "Who has time to read it?"

With the inundation of technology, Goyal says he's gone back to the basics of building relationships.



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