

Briefing

BUSINESS DEVELOPMENT

MAY 2012

Interview

Lance Sapsford

Addleshaw Goddard's BD director on adding value and doing BD differently – really differently

Feature

Difference squared

Law firms must now be different in what they can add to a client relationship, rather than just how they do law

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Playing the relationship game



Why aren't business development people in law firms client-facing?

The mind actually boggles (I swear I can feel it) when I try to understand why BD and other client roles, such as account management, in legal aren't true customer-facing roles. This needs to change.

In this issue of **Briefing**, we look at why it's now so important to be really close to clients – which means making as many

people in your firm client-facing as possible, and finding ways to deliver a lot more value to clients to make your relationship as tight as as you can. Our interview with Addleshaw Goddard's head BD honcho, Lance Sapsford, has some great pointers in it, as does our in-depth feature article, covering what firms are doing to be really different, and why.

Plus we have analysis from key industry suppliers on everything from pitch prep technology to CRM to mobile – including a great interview with Hubbard One's head of BD solutions, Vince Scarinci.

I hope you enjoy our efforts this month.

Rupert White, editor of Briefing

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Interview: Lance Sapsford, BD chief, Addleshaw Goddard



Rupert White talks to Addleshaw's business development director about doing BD differently – really differently. How can mid-tier firms survive? Perhaps we can help...

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Feature: Difference squared



Differentiation is so 2011 – now law firms must be different in what they can add to a client relationship, rather than just how they do law, reports Grania Langdon-Down

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Research: What clients really want



Your clients want more of everything – but new research from Martindale-Hubbell gives some insight into what they really want.

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TURN OVER TO FIND OUT WHAT ELSE IS IN THIS MONTH'S ISSUE

Industry analysis

In Briefing we bring you industry analysis from leading voices in the legal sector.

This month: Briefing talks to Hubbard One's BD solutions guru about how technology can deliver more value, Capsticks' marketing manager explains how Aderant's CRM helped the firm's strategy for growth, and we have an analysis of how mobile apps can help deliver better client service, from Tiger Eye Consulting.

This month's interview with Lance Sapsford at Addleshaw Goddard was transcribed by:



Business, developed



Business development technology can help firms improve client service and gain a competitive edge, says Vince Scarinci from Hubbard One

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Capsticks' CRM conversion



Customer relationship management by Aderant has transformed the way PI specialist Capsticks sees its clients

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Marketing goes mobile



Mobile apps can help you deliver more value to clients and better information to fee earners, says David Wilson from Tiger Eye Consulting

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The Briefing Interview

Make your own road

Rupert White talks to Lance Sapsford, business development director at Addleshaw Goddard, about doing legal BD differently – really differently

Addleshaw Goddard hasn't had the best of the recession. It lives towards the top of the mid-tier, and as such it's in one of the most pressured, insecure places in today's UK legal market.

If you were to go on the firm's financials, the story would be one of money flowing away from the business as the crisis rolled like tank across the country, the firm dropping down to 21 in the top 100 rankings in 2011, and a £30m fall in revenue from a near-£200m point to £162m in the last full year.

But that's not the end of the story. In 2011, Addleshaw saw an 11% rise in revenue, it's hiring litigators like they're going out of fashion, and it won a place on the BA panel alongside big-hitters Slaughters and Linklaters.

So what's going on at Addleshaw Goddard?



Perhaps Lance Sapsford, Addleshaw's business development director, has some of the answers. As law firms move from trying to define their differentiation to seeing differentiation in terms of delivering value, his firm is making a big deal out of being really different in the mid-tier. But can mid-tier firms really be different?

Some of Addleshaw's special sauce appears to be a determination to "focus on how the law can help the [client's] business, how it can be interpreted for the business and what context it is being applied within to help the general counsel make sure that he is able to manage risk, or whatever it is he's trying to achieve", he says. Note the repeated "for the business", there.

Sapsford says this approach has "yielded significant benefits" in relationship building, but they've had to go further (as have many firms) and deliver more value to clients than that. He defines this as a strategic approach towards "engagement and investment" in clients, either "in cash terms or in relation to the amount of resource we put in", such as value-added services, secondees and so on. This is, he says, thinking strategically about what is going to help the client, and therefore the firm, to build a relationship.

"It's about investing in client relationships before we see a return, so that we build that relationship based on a deep understanding.

We've seen some significant improvements in the revenues from clients, and profitability, because we've been able to do this."

The problem with 'value' is, really, what does it mean? To Sapsford, it can mean anything from training seminars and updates to secondments, "which have a significant cost to



"It's about investing in client relationships before we see a return, so that we build a deep understanding. We've seen significant improvements in revenues and profitability because we've been able to do this."

us", even up to putting partners on secondment for prolonged periods of time.

Addleshaw has centred these ideas around a key account management programme and something it calls the 'Client Development Centre'. The CDC is "effectively a small consultancy, specialising in personal and organisational development of our in-house

clients”, says Sapsford. Through the CDC, Addleshaw helps client contacts with a range of issues, from internal relationship management or internal comms to how they can be better positioned within their business – even how to run a better panel review.

The firm doesn’t tend to charge for these services, Sapsford says. Instead, the consultancy work is both a value-added service and a way of putting some work in up-front with a view to finding new work streams with the client – but in a way in which clients appreciate, “because they can see that it’s for their benefit and not just for ours”.

That means doing a few things differently. “It’s about understanding the client properly, not just reading their annual report – it goes much deeper, it’s proper business analysis of the client that the partners and the client account teams undertake,” he says.

Addleshaw has tied some “well-known business school models together in a particular way”, he says, to reach an understanding – or at least an analysis of a potential client’s business – which is then validated or adjusted following a client conversation. This has some surprising unintended consequences, he says – sometimes this helps the GC or head of legal understand their own business better.

Sapsford calls the approach ‘Me to You’, which, though sounding like management speak, neatly describes a shift in focus towards the client – away from the firm’s chargeable hours, the firm’s profitability, the firm’s need for growth to thinking about “the client’s requirements, the client’s need to control costs, or the client’s need to move strategically into

a new area”, which “translates into how we behave in relation to the client”.

Pricing models to suit clients

A big part of seeing things the client’s way recently has manifested as pressure on pricing.

But here’s a harsh truth about the ‘new pricing’: Sapsford says clients have consistently asked Addleshaw to offer up an “innovative

BD, marketing and client relationship management skills are now “absolutely critical in a world where law firms are competing ever more intensely”.

pricing solution”, but the take-up isn’t great. Sapsford thinks this is because the legal business, on both sides of the buying relationship, struggles to move away from models it understands – like hourly billing or the straightforward ‘new’ fixed fees. Clients also need to compare the firms they’re looking at, and the only way they really know how to do that is with a rate card.

Addleshaw has “done a lot of work and some serious investment in understanding pricing, both at a tactical level, because there’s been such harsh price pressure in the industry recently, but also at a strategic level”, he says. This extends to working with Cranfield School

of Management to analyse what kind of pricing Addleshaw clients and prospects actually want. The results have helped Addleshaw build a host of better pricing models, Sapsford says.

The Cranfield research, he says, has analysed how legal pricing has been affected by the recession by sector, and now Sapsford's team is attempting to match pricing models to those sectors – because there may be, he says, significant correlation between a sector, its approach to pricing under pressure, and the pricing models it may prefer.

This should mean that the Addleshaw BD team, when working up a pitch, can now start with a model they're confident a client will like, rather than have to throw in every option under the sun and have most thrown back out.

Creating value for clients

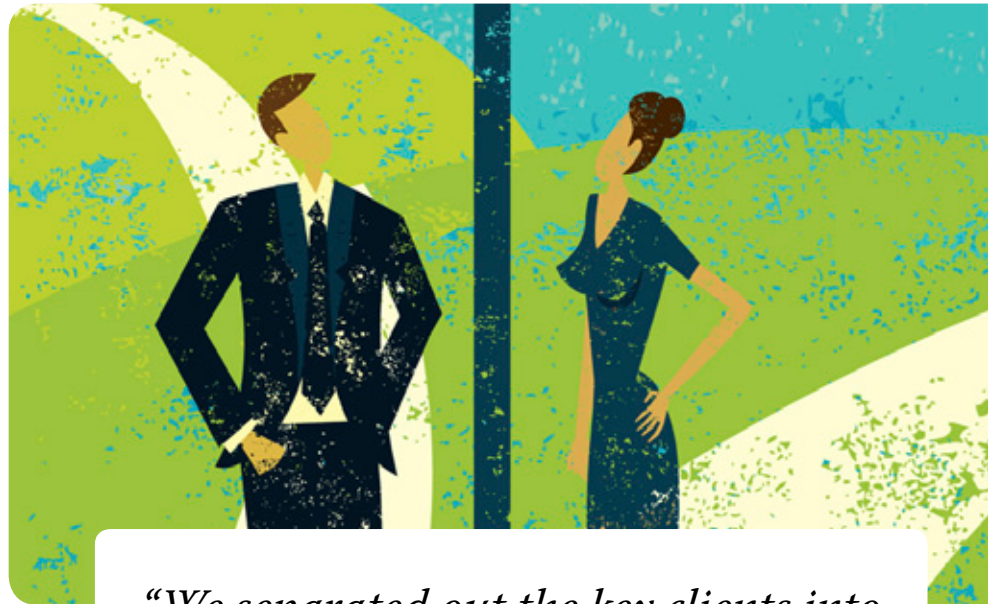
Whichever model clients want, most of them want a lot more cost certainty. But how can you offer cost certainty when the work itself is variable in its nature?

It becomes a question, says Sapsford, of understanding the nature of the work and looking at how you deliver that work, whether the work is done with the firm's lawyers, "or via an outsource model or whether it be via a transaction services team which we have up in Manchester" – whatever it takes to create value at the right price.

Addleshaw is linking business analysis, the core of 'understanding the client', to work resourcing assessment in a small but important

way – if the firm can be analysed in a holistic way, what work it's doing for whom and how, you can get a real idea of how profitable any client is and how much it costs to service that client, across all practice areas.

"You need to understand the profitability of the client in a cross-divisional way," he explains. "That was the reason we separated out the key



"We separated out the key clients into a specific programme, and we now measure them and look at them as a portfolio of accounts, regardless of division or service line."

account clients into a specific programme, and we now measure them and look at them as a portfolio of accounts, regardless of division or service line."

Value through efficiency

This is an example of the mid-tier learning lessons from other business sectors – moving

to a truly client-focused, rather than practice area vision of work.

An important part of delivering this change is to get the business services departments working closely together, says Sapsford.

“Profitability is driven by business development working with finance, working with the account planning teams,” he says, to figure out “how the work should be leveraged, what level of profitability is acceptable, and how to ensure that we maintain that level of profitability in the face of the quite severe price pressure.”

Now, when a tender comes through, Addleshaw’s client teams determine “how the team will be structured, who’s going to be the client development relationship partner, who’s going to be the relationship manager, who is going to be the senior lawyer, and what value added services we are going to do”.

This looks a lot more like management consultancy, and is the shape of things to come in some legal market segments.

“It’s about looking into the firm to see what we can offer, how we can be different and aligning what the firm is doing to support the client, as opposed to trying to map the client’s needs to what the firm already does,” he explains.

Developing client relationships

Pricing pressure is particularly hard on mid-tier top 100 firms like Addleshaw, which is pushing firms to be more innovative and efficient – though many firms, it could be said, aren’t achieving either of those goals.

But, says Sapsford, “it’s not a question of just giving away margin – it’s a question of being efficient so that you can deliver value to a client in the way that you deliver legal services”.

A big part of being innovative is finding better ways to get closer to clients, to drive the relationship beyond a purely commercial buy-sell deal. But, most BD and client management people in law firms aren’t client-facing, which simply must be holding law firms back from

“Profitability is driven by business development working with finance, working with the account planning teams, to figure out how the work should be leveraged.”

achieving better firm-wide relations.

This happens, says Sapsford, because “there is still very much a reluctance among lawyers for anybody to speak to their clients apart from themselves”. But “the other end, which I suggest is us, is a collegiate approach to being as progressive as possible to make sure we deliver what the client wants – and if that means that we need some professional help to manage relationships, then we should bring that in.”

Law is still miles behind accountants in moving client relationships over to dedicated people, he says. Sapsford knows whereof he speaks when it comes to accountants – he

spent seven years in finance, first at KPMG, then at Horwath Clark Whitehill, until he came to legal in 2002, at BLP – and the firm-wide client approach will be vital for any mid-tier firm that wants to survive the coming consolidation flood, he says.

“It’s absolutely imperative that we professionalise ourselves, because in our mid-market position, we can’t command a premium and do global M&A work – but neither are we at the volume end, and so we differentiate ourselves by our client approach.”

This is driving an uptick in business services staffing at Addleshaw, says Sapsford – especially of client-handling staff. “Account management, has definitely become much more prevalent across the legal market. That’s probably the most significant manifestation of taking account management seriously.”

Addleshaw’s relationship managers work “hand in glove with relationship partners”, he says. Most importantly, they’re client-facing people – which is a vision of the future for tomorrow’s mid-tier survivor.

Extending client services

Extending the ‘getting closer to clients’ idea to its end-point is for a firm to offer the services of any of its departments to a client, if they need it – from HR to IT, from risk management to KM. Sapsford acknowledges this idea and says it’s part of the Addleshaw goal now to deliver it. But how to get there?

“It’s about credibility. You have to have good ideas based on commercial logic. It’s no good coming up with ideas which are just fanciful.

It’s also about thinking very carefully about alignment, and a cultural acceptance that this is the right thing to do.”

None of this is easy, he says (no kidding), if you want to really change the way the firm thinks about client service delivery. The change has to come from the top, and the right people have to “understand, believe and live it”.

“You will not deliver an authentic experience for your own people internally without it being genuinely believed at the top.”

The way these concepts work together at Addleshaw make a lot of sense when seen as

“Account management has become much more prevalent. That’s probably the single most significant manifestation of taking account management seriously.”

a linear progression. First, senior buy-in to drive the change forward; then, the creation of credible programmes grounded in commercial usefulness – for Sapsford, the key account programme and the CDC. Then, as the ideas generate interest with clients, the business can be more aligned with the new methodology “because people can see that it works”.

He’s got to see that it works, because being different is still the biggest gorilla on the block when it comes to marketing and BD for law firms. Sapsford is of the opinion that there’s a “huge amount of consolidation” to come in legal, because there are still so many firms offering

similar services to an increasingly demanding client base. But while differentiation is “extremely important”, he says, “the proof of the pudding’s in the eating – a client is not going to care what you say about yourself, if the service isn’t right.”

Handling procurement the right way

Differentiation might not matter as much in the future – despite everything **Briefing** has said for years – if a trend in legal buying grows: general counsel being supplanted in legal buying by the procurement department.

According to the [Martindale Hubbell research outlined from page 19](#), this is still a relatively small issue for law firms, but it’s on the rise, particularly in the UK.

“It’s come a long way since the early 2000s, when RBS upset the market massively with the first entirely procurement-led panel review,” says Sapsford. “It’s pretty standard these days. One of the first questions asked internally is ‘Are procurement involved?’, and quite often they are.”

This can have a fairly dramatic effect on a law firm if it’s not ready for it, as Sapsford aptly explains: “When you’re on the wrong end of a reverse auction for hourly rates in an online environment, where you have no contact with the actual consumer of your services, you had better understand what they’re trying to achieve and what you’re trying to achieve.”

But procurement shouldn’t be feared, he

says: “The key thing is to understand where procurement are coming from, what and how they’re trying to achieve, and how we can work to get the best outcome.

“We have actively tried to engage with procurers or procurement departments outside of any panel or pitch process to build a relationship with them, which will help us



“A client is not going to care what you say about yourself, if the experience that they get from you, whether it’s in terms of delivery or service or price isn’t right.”

when the time comes.”

This is, in essence, treating procurement the way you’d treat a GC – understand them; make sure you also understand your own position ie, “If you’re being procured, what’s your bottom line?”; and “don’t be afraid”.

‘Don’t be afraid’ sounds like good advice, but it probably only applies if you’re ahead of the curve – otherwise you may want to be very afraid indeed. ●

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Feature

Difference squared

Value is the new word in legal business development. From helping clients become better business people to sorting them out with secondees – and much more besides – law firms must now be different in what they can add to a client relationship, rather than just how they do law. Grania Langdon-Down reports



The question why a client should choose your firm over a rival remains the hottest topic in legal marketing and BD – and the answer is no longer just ‘differentiate yourself’.

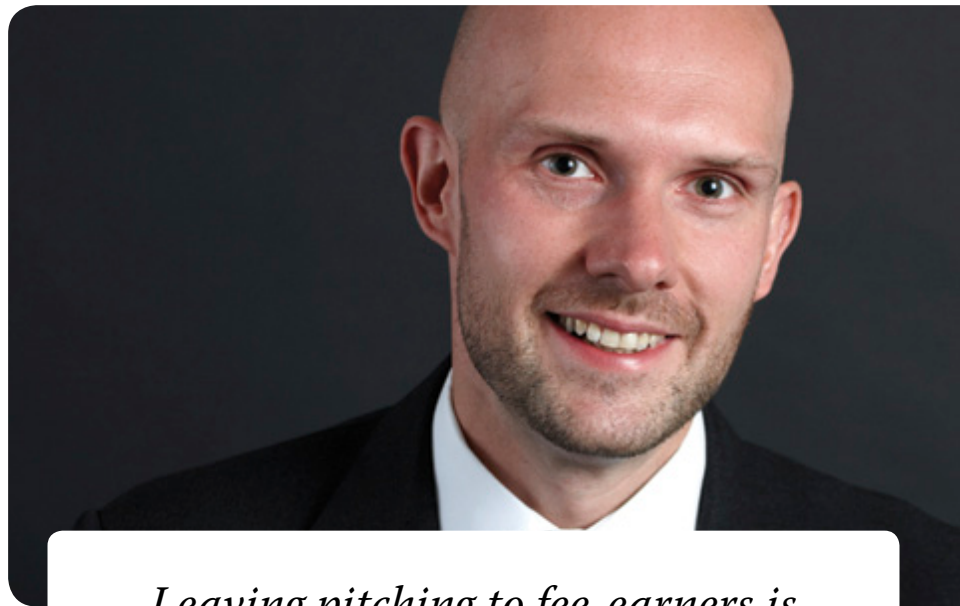
It’s now more about being “like Velcro”, says consultant James Hacking – “the more parts of your business that are touching more elements of the client, the stickier the relationship”. This makes BD and marketing into a fully strategic area – but what strategies can firms use to wrap themselves around clients and win a competitive edge in tomorrow’s legal market?

A significant, but challenging, way that firms can deliver more value, get closer to clients and be different is by making their business services teams more client-facing – however threatening that might seem to some partners. Clients might benefit from the compliance experience of a law firm’s IT director, for example, or a law firm HR director’s understanding of contracts. Or perhaps both sides might benefit from letting finance departments speak more directly.

This is probably even harder in firms that don’t make client-side people like BD client-facing. There appear to be many top 100 firms starting to move down this road, but, says Hacker, it is those whose partners – and therefore culture – genuinely encourage operational teams to build relationships with clients that are getting ahead.

At niche pension specialist Sackers, the three-strong BD team and the ‘Know-how’ team of four support lawyers (one of whom also carries the in-house counsel role) are as promoted as fee-earners on the firm’s website – a much more modern approach than many – and they’re both client-facing.

Mark Wileman, head of business



Leaving pitching to fee-earners is “like dropping your child off at school for the first day – you know they’ll be fine but you wish you could be with them.”

Mark Wileman, head of BD and marketing, Sackers

development and marketing at Sackers, joined the firm from rental company Hertz in 2007. ‘My background lends itself to where I want my team to be,’ he says. ‘It is quite rare to be this client-facing in the legal sector, though it was par for the course at Hertz.’

Pitching, however, it is still down to fee-earners. “It’s like dropping your child off at school for the first day,” he admits. “You know

they will be fine, but you wish you could be with them.”

But Wileman says this imbalance will change as clients see more support people pitching to them in other sectors. “We will get there eventually. There is a role for BD at the forefront of winning and retaining business.”

But for Serena Simmons, co-chief marketing officer at Hogan Lovells, the whole business needs to think of itself as client-facing – Hogan Lovells’ client teams all include a BD person.

“That [BD] person will have a direct relationship with our financial clients and deal with a lot of commercial and organisational aspects.” This is particularly true, she says, in situations where procurement is running the show at a client, because BD people can be “better tuned to procurement’s concerns”.

Lessons in adding value

Once you have your client’s ear, how do you capitalise on the relationship? Answer: Account and client relationship management, says Hacking, pointing to Addleshaw Goddard’s Client Development Centre (CDC), launched in 2007, as an example of a game-changing way of doing legal business.

The CDC helps client legal teams, for example, raise their commercial acumen and maximise internal impact through behavioural profiling, business simulation workshops and tailored coaching. Addleshaw is now raising the bar again by bringing in Svend Frederickson, who has extensive experience in strategic leadership development in both the legal and corporate sectors, to head the CDC team. The CDC is a big investment for Addleshaw, but it’s viewed as part of a “long-term relationship” with clients, explains Frederickson. (*see our interview with Lance Sapsford, head of BD for Addleshaw, on p5 for more on the CDC*)

Nina Barakzai, EMEA privacy counsel for Dell Corporation, tells Briefing...

WHAT CLIENTS WANT

Differentiation

Some firms give you surround sound service, while others are tuned in to the way you work and offer their affiliate firms or outsource providers for rush jobs, which is a neat piece of additional service.

Homework

I may ask a standard question. I know what the law is, I just need an interpretation for my business – but I end up with questions about the structure of my business, which you should know from day one.

Information

I have data coming at me from every quarter. Highlight relevant aspects of black letter law, show how you have used it to help other clients, and suggest material I may find useful so I don’t feel I am being milked for money.

Fees

Clients want value for money, but not at any cost. My in-house colleagues say they may get the specialists they want but the firm then doesn’t consolidate the advice. If I am buying a branded solution, I want it to hang together.

CSR

I need to know more than just pro bono – how you do governance, what you are doing to improve diversity, how ‘green’ you are.

Social media

Don’t be nervous of it. CMS Cameron McKenna, and Pinsent Masons’ OUTLAW, post very good tweets. Twitter can be a valuable BD tool – posting a handy check list on bribery would attract me to go to that firm for more specific advice.

These initiatives need not just be for established clients – once they become open, they transmute into sales tools. Sackers’ ‘Sackers TV’ and ‘Sacker Extra’ value-added programmes were once password protected – now they’re available to everyone. “Our ‘Know how’ services were seen as one of the jewels in our crown,’ says Wileman, ‘but we were investing all this money in a leading service, then hiding it behind a wall.”

The walls were torn down at the beginning of 2012. From a marketing point of view, Wileman says, there’s still work to do, but the services add to Sackers’ SEO – which increases visibility to potential clients.

Hogan Lovells’ merger has seen two firms with different qualities create a more client-centred business, says Simmons. Lovells spent a lot of energy putting in place a structured client programme, she says, while Hogan & Hartson brought entrepreneurialism, because US partners are very client-focused.

Hogan Lovells doesn’t have a big, single ‘product’ like Addleshaw’s CDC – instead, the firm finds other ways to get closer to clients. “One way we build individual relationships is through CSR, where a client’s interests and ours are closely aligned,” says Simmons. “We partnered with one institution’s CSR team to put together a citizenship programme, [for example].”

Branding matters more than ever

In last year’s **Briefing** on marketing and BD (Feb 2011), Laurie Robertson, Baker & McKenzie’s global head of marketing and BD, argued that too few firms considered branding

like a consumer goods company, ie, in a competitive environment, it’s vital to stand out.

So have firms managed to change? Well, no. For a lot of professional services firms, brand still doesn’t even make it into the priorities, says Eversheds’ head of corporate communications Imogen Lee.

Perhaps this is because many professionals find the practice of branding too nebulous, or they assume it’s all about logo design, she says, but either way “brand awareness and

“We wanted insight into how clients see the firm, what differentiates us. By asking brand perception-related questions, we have a good sense of what characteristics people associate with us.”

Serena Simmons, co-chief marketing officer,
Hogan Lovells

perception play a crucial role in determining the clients’ decision to buy. They also have a role in recruitment and motivation of staff, and engagement with the firm’s key stakeholders”.

Hogan Lovells is currently digesting the results of a survey of 300 clients worldwide. One part conventional research into client satisfaction, one part brand perception, it’s an attempt to define the firm’s USPs.

“We wanted insight into how clients see the firm, what differentiates us,” says Simmons. “By asking brand perception-related questions, we have a good sense of what characteristics people associate with us.”

At the Parabis Group, owners of the Plexus

Law brand, among others, the challenge is how to consolidate a range of brands while differentiating itself as a one-stop-shop.

The group's core is its legal services – Plexus on the defendant side, Cogent on the claimant side – but it has a number of complementary professional service firms (rehabilitation, health and safety, liability adjusting) under the Argent brand, with a third 'hybrid' strand of outsourced and co-sourced claims handling. It also offers clients 24/7 PR crisis management as a value-add.

Group marketing director Mark Marshall says that Parabis "fell into the trap that as we added a new firm we almost added a new brand". Now, however, it's in the position of having a "firm stable of brands on which to build awareness". The company is now waiting on its ABS application, which will open up new avenues, and now that the group is settled, Parabis is throwing some money into PR to gain media coverage.

BD, marketing and the board

But what's it like at the coalface? Has a shift in focus towards getting closer to clients changed the roles of BD and marketing?

Something that has affected BD significantly, at least in the UK, is the growing need to deal with clients' procurement departments. Parabis, says Marshall, has added a bespoke bids and tenders manager to the marketing team to deal with this challenge.

Alongside procurement, compliance is increasingly changing the BD process, says Mark Tosetti, marketing director of property

and litigation specialists Optima Legal.

"It changes the nature of the proposition you give. What that can mean for some firms is that partner relationships may become weaker, [but] dare I say it – you need marketing there.'

Some say that the growing presence and prominence of BD means that BD/marketing leaders should sit on the board or management



"Parabis fell into the trap that, as we added a new firm, we almost added a new brand."

Mark Marshall, group marketing director,
Parabis Group

committee. (David McLaughlin, Simmons & Simmons FD, echoed this in [Briefing on strategic information, Feb 2012](#))

Marshall at Parabis reports directly to the CEO, but he fears that sitting on the board could sidetrack BD. Marketing itself, however, is finally "winning its spurs", he says.

But some firms still see marketing as little more than putting 'pretties' on things and running promotions, says Tosetti, when "it's a

hell of a lot more than that”.

“You need to think about research, how you create your positioning, how you build your USPs, how you manage your brand. Marketing is a balance between an art and a science.”

ABSs and the future

One development everyone is watching is how the rise of alternative business structures will change the level of competition in the market.

Sadie Baron, head of marketing at Eversheds, is not convinced ABSs will have a significant impact in the short term on a law firm like hers – but, she says, there’s a good chance the legal businesses set up outside the usual partnership model will adopt a more focused, direct sales and marketing approach, depending on the market they are competing for. What this means, of course, remains to be seen.

What’s already gaining traction is the use of social media. As head of corporate comms Lee says, “the next generation are digital natives, and will be the partners and clients of the future – so it’s a no-brainer that we use social media now, refining how we do it in line with our clients’ levels of engagement and interest”.

Hogan Lovells uses Facebook for graduate recruitment, for example, because it touches the right audience. It also uses blogs feeding to Twitter to create online discussions.

But other firms are a little more cautious. Parabis is about to start a complete digital strategy review. “The debate still rages between those who say social media is the only way to go, and those who feel it still has to prove itself,” says Marshall. ‘No one has yet come up

with a magic formula that says if you do ‘xyz’ this translates to ‘xyz’ new instructions.’

And Optima’s Tossetti is sceptical about the value of social media. ‘Although some organisations argue that you can get good metrics from Facebook, the B2B environment aren’t the kind of people who would click ‘like’ [on a law firm].”

Instead, Optima is getting heavy on email marketing, using dynamic content based on behaviour and preferences to move readers down a funnel and turn a “suspect into a prospect” – very much like the systems many publishers use. (*See the interview on page 23*)

“The next generation are digital natives, and will be the partners and clients of the future – so it’s a no-brainer that we use social media now.”

Imogen Lee, head of corporate comms, Eversheds

with Vincent Scarinci of Hubbard One for more on this topic)

The 2012/13 year will be a tough one – whatever your position in the top 100 or 200. As Marshall says: “Other firms have to work just as hard climbing up the greasy pole as the top 20 do to retain their positions. Whatever your ranking, you can’t rest on your laurels.”

This makes BD and marketing people more vital than ever in a law firm – if they can convince their firms to get them, and many others inside the business who aren’t fee earners, closer to clients. ●



What do your clients really want?

Clients are simple beasts. They just want ultimate value, trust, great pricing, sensitivity, speed, service and, of course, brilliance. Nothing to it.

But don't take our word for it – a Martindale-Hubbell survey, *'The Selection and Retention of Law Firms in Western Europe'*, released just days before this **Briefing** was published, delivered these results. Martindale-Hubbell surveyed 219 heads of legal across 16 Western Europe countries and asked how firms should build successful, long-term relationships with in-house teams.

Hiring, the results show, is heavily influenced by their understanding of the client's business needs, objectives and culture. Speed of response, client service and a lawyer's expertise were also influential factors. Having a lawyer as a 'trusted adviser', not just a technician, was highly rated by respondents.

Just over 50% of clients say they've evaluated law firm performance in the last year, and a fifth of respondents plan to do so. But

law firms should not assume that their brand or personal connections will prevent them from getting the chop when the re-evaluation comes – the study showed brand to be a weak justification for re-hiring a firm.

Cost control remains the big concern for the majority of clients over the next year, but the survey revealed that just 16% had discussed these challenges with their law firms.

In the UK, in-house lawyers say they value the 'people' factor, but it's not the be all and end all – just one fifth would remove a firm if they did not like the lawyers.

As many people know, clients want to employ fewer firms. Almost 40% of UK

40%

of UK clients intend to reduce the number of law firms they use in 2012

respondents intend to reduce the number of external law firms they use. Surprisingly, though, 15% said they plan to do the opposite.

When the reviews happen, the research found, better value for money is much more important than just reducing legal spend.

Hiring and firing

Decisions on hiring and retention show a consistency in behaviour, with more than three quarters of respondents rating ‘understanding their business’ as the most important factor.

Cost plays a much greater role in re-selection than hiring, with just a third of respondents saying it’s ‘important’ in initial selection compared to 70% for re-hiring.

But what makes clients unhappy? Top reasons for dissatisfaction were poor service and not understanding client needs. Unfair or unclear invoicing, cost underestimation and bill padding were the next most cited reasons, which indicates that clients experience this and know it’s happening, which cannot be a positive reflection on the profession.

When it comes to adding value, most firms have offered clients additional free training events or seminars in the past year, and secondments, staff exchanges and free six-monthly review meetings are also out there.

If understanding the client’s business is key, what are their challenges? Cost control is shown to be the biggest issue facing in-house counsel, along with increased workload, litigation and compliance.

As cost pressures and maintaining sector knowledge are growing client concerns, perhaps law firms could strengthen their relationships by holding regular discussions on many of the issues above. ●

Adding value *What are firms doing?*

60%

of firms have provided free training and seminars as value-added services in the last year

26%

have provided clients with secondees to deliver more to their relationships

34%

of firms haven’t increased the range of value-added services they offer at all

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<http://bit.ly/Martindale-research>

Jobs with Briefing

Reveal your next career move

Business Development Manager, Field Fisher Waterhouse

London Exciting opportunity for a highly motivated BD manager to join this ambitious, growing law firm. You will be capable of managing the full sell cycle, get buy-in from partners quickly, and become a key player in the sector team.

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TOP JOB

Marketing & BD Manager (Corporate)

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Product Manager, IRIS Legal

Knutsford High-profile role with responsibility for product planning and execution throughout the product lifecycle. You will have recent experience of working in a legal practice, and knowledge of the legal software market is desirable.

[click here to learn more](#)



L&D Risk Manager, Clifford Chance

London New role with responsibility for structure, content and delivery of the firm's global professional skills and ethical training programme. Previous experience in a similar role, preferably in legal, including constructing e-learning courses.

[click here to learn more](#)



Research Analyst, Shook, Hardy & Bacon

London Interesting position providing support on FMCG and marketing regulatory issues. Frequent liaison with legal and other professionals so excellent interpersonal skills required. Based in Central London, with some international travel.

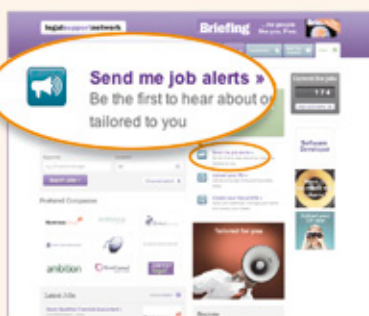
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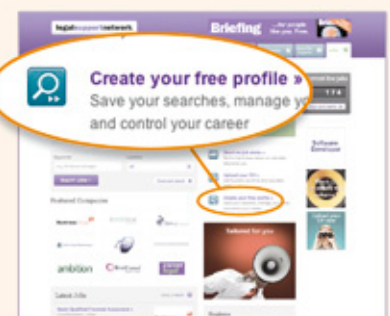
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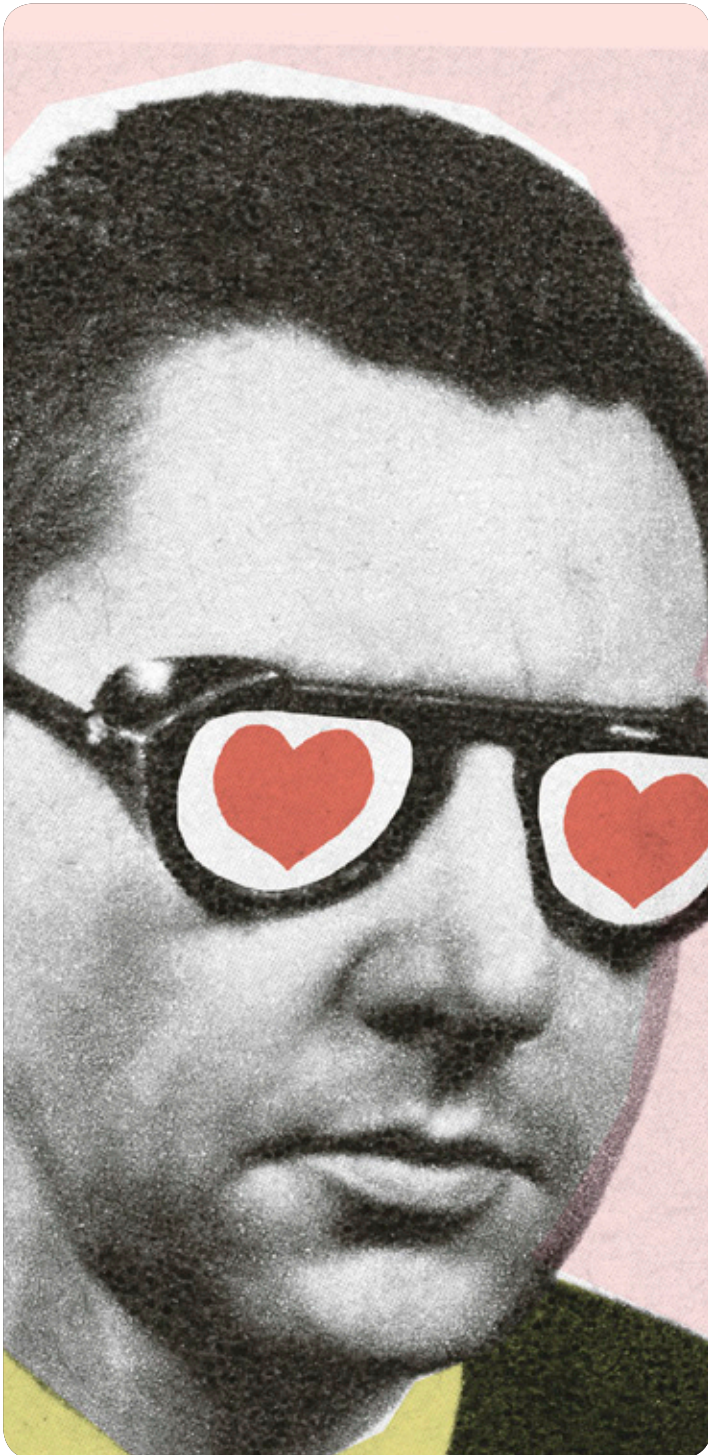
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Closer to clients



Business, developed



Business development technology can help firms improve client service and gain a competitive edge, says Vince Scarinci from **Hubbard One**

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Capsticks CRM conversion



Customer relationship management software by **Aderant** has transformed the way PI specialist Capsticks sees its clients.

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Marketing goes mobile



Mobile apps can help deliver more value to clients and better information to fee earners, says David Wilson from **Tiger Eye Consulting**

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Interview with Briefing

business, developed

Briefing speaks to Vince Scarinci from **Hubbard One** about how business development technology can help law firms improve client service and give them a competitive edge

Business development, says Vincent Scarinci, is becoming ever more dependent on technology – from saving time in building pitches to delivering a firm-wide view of clients, software is changing the way law firms sell their services.

He might well say this – he’s director of BD solutions for one of the pre-eminent marketing software businesses. But it’s also true: law firms are using new IT to better understand clients, whether it’s BD technology, business intelligence or social media sniffing.

This is great for gaining a competitive edge, no matter your size – but, he says, technology can be even more useful to mid-tier firms if they want to compete with their bigger cousins.

“Mid-size firms are looking for the piece of pie that magic circle firms or some of the larger US firms have had a stake in – so when they approach the client, they have a higher bar to jump over.” This makes great preparation and

client understanding crucial. Some of the firms Hubbard One works with have invested heavily in technology to help them, “from our proposal generation systems that Addleshaw Goddard has instituted, for example, to our CRM technologies in use at firms such as Nabarro and Irwin Mitchell”.

“Mid-size firms understand the need for CRM and they’ve adopted systems sooner. They approach a project differently – they don’t have the unlimited budgets of the magic circle firms, so they get to an end result at a slightly lower cost [by just trying harder].”

The very top law firms, he says, are now or are on the edge of rolling out new iterations of their CRM technology, which the savvy mid-tier was doing two years ago. This might seem like doom, but it takes big firms longer to roll out technology firm-wide, which gives forward-thinking mid-tier firms time to implement the newer technologies.

When it comes to the pitch, what separates a law firm is “the last 15%”, Scarinci says – and that tends to be the hardest, human work. Firms that automate the other 85% with tools like Proposal Generator and Experience Manager – or any technology like it – “can focus on winning the deal”.

Having firm-wide information is the key, especially when it comes to winning over procurement departments. “When you link financial and client information, that creates a much better picture.”

Technology – both BD and firm-wide IT – also helps formal tendering.

“If you’re answering experience questions with a manual process, it’s hard, especially as it’s often from a combination of different systems. BD technology addresses that by bringing financial, matter and description information together, and letting the BD team react in a more automated way.”

New media marketing

Businesses like Hubbard One now also have solutions to help firms ‘repurpose’ internal information, to make emailing a more seamless process and to enable up-to-the-minute legal alerts – something clients want.

“Firms can now distribute content faster and analyse some of the behind-the-scenes analytical information to identify who is reading its contents”, says Scarinci, which could

be incredibly useful for suggesting new work or connecting better with clients.

None of this will be any good, though, if no-one uses your systems, which is why Hubbard One built the new version of its software with a ‘Google-style’ search interface.

“You have to focus on fewer clicks, and on



“Having firm-wide information is the key – when you link financial and client information, that creates a much better picture.”

the little nuances in an application that can make a huge difference.

“When we think about how to improve the user experience, generally we’re thinking about how we can really give more value to the people that mean the most to the firm.”

Click here to learn more about
Hubbard One, a Thomson Reuters business
www.hubbardone.com/bds2012



Case study

apsticks' CRM conversion

Customer relationship management by Aderant has transformed the way PI specialist Capsticks sees its clients, says Alison Evans

Enacting a strategy for growth means gaining a widening client base and disseminating customer data within the firm. That's not easy when that information is trapped inside your partners' heads.

This was the case at Capsticks after three years of growth – the firm morphed, says business development and marketing manager Alison Evans, from a smaller firm that could just share information at regular meetings, into a “larger, extremely busy firm with acres of client information and nowhere to put it”.

The firm was at a critical point, she says, expanding into the health sector and opening new offices in Birmingham and Leeds. “We urgently needed to open up access to information beyond partners to all fee earners.”

This realisation came at the right time – Capsticks enjoys a great reputation, “but the market is now so competitive and the healthcare sector is under massive pressure

to save money” that reputation wasn't enough – the firm needed to be able to leverage hard client data, Evans explains. “We had to adopt a more proactive and aggressive approach to keep clients and win work.”

Firm-wide flexibility

Evans and her team wanted a firm-wide customer relationship management (CRM) system to pool the firm's disparate client information. They chose Aderant's CRM4Legal because Evans felt it was “more intuitive and more adaptable” than the alternatives.

This would allow much-needed flexibility – most people in the firm hadn't used any form of CRM before and working for the healthcare sector requires a lot of individualisation.

“The ability to tailor any system to the minutiae of the healthcare industry, and

specifically the structure of the NHS, was paramount,” says Evans. “And, as the NHS experiences more structural changes, we can easily adapt the CRM to match.”

To maintain a common interface, data goes into CRM4Legal through Outlook and synchronises between the two. And, above the desktop, the team can now run reports on client data and business development activity across the whole firm, something Evans says is enormously useful.

The real challenge when implementing the CRM, says Evans, wasn't technical but cultural. “It's an ongoing culture shift for us: for everyone to own the system and the data.”

“We now have firm-wide ownership of client and target data, customer targeting is much easier, and we have much-needed information access and sharing.”



CRM's competitive edge

Making that shift needs champions in the firm and demonstrable benefit.

The integrated nature of CRM4Legal delivers valuable time savings in the business for the firm's CRM executive, because as information is centralised, getting more data and integrating it into the business is now easier and quicker.

The BD team has also integrated email with the system and uses customer data alongside external databases. CRM4Legal manages the de-duplication process, which is “saving us so much time”, Evans says.

A firm-wide CRM can also play a vital role in policing behaviour, guiding and controlling activities and events around creating new

business and clients. It should now drive partners to follow up, says Evans, and the BD team can analyse the return on activities.

Evans says CRM4Legal has “helped us compete better”, something that's vital in a highly competitive sector like healthcare.

“At the moment the sector is very vulnerable to client grabbing,” says Evans, “so the CRM focus is tip-top service, visits and communications to safeguard the client base”. General practitioners are also a Capsticks

target, and CRM is helping the firm win them. “It's helping us stay proactive – a report on a GP contacts highlights gaps and weaknesses, creating targets for cracking the sector.”

Though Evans knows the CRM journey at Capsticks is far from over, and it's not been easy, the benefits are fully apparent.

“At the beginning it was hard, but we now have firm-wide ownership of client and target data so customer targeting is much easier – and we have much-needed information access and sharing during a critical growth phase for Capsticks.”

Click here to learn more about
Aderant CRM4Legal
www.aderant.com/





Industry analysis

Marketing goes mobile

Mobile apps can help you deliver more value to clients and better information to fee earners and staff, says David Wilson, director of Tiger Eye Consulting

'App' is the buzzword of the moment. The American Dialect Society named it word of the year in 2010, and people from 16 to 60 years old now discuss their favourite apps on the bus. Apps can help you with many things, from a weather forecast to how to carry out CPR – but can they do anything for legal businesses?

Competition for customers in legal is at an all-time high. So, to stay competitive, firms need to find a differentiator and deliver a clear and consistent brand message to staff, clients and potential clients.

But what is it that sets your firm apart from the others? Are you seen as technologically forward-thinking, offering and using the latest technology to improve and enhance your client experience?

Perhaps this is where apps come into their own for legal – as a method of improving communication, both externally and internally,

for the forward-thinking law firm.

Content is king in the app world

Law firms already have a great advantage in the world of apps, without realising it. Many of them already have sophisticated back-end systems that manage their intellectual property, knowledge, documents and other content – and it's this information that can make apps in the legal sector so attractive and useful.

Although all this existing information can be harvested and leveraged by an app, law firms still have to decide how much of it is of value and how much can or should be served up.

This will differ according to the intended audience. Therefore, developing two or three different apps, each with its own content and functionality for specific target audiences, can be a good approach if you want to touch all

essential areas of marketing and information provision through apps.

The three main types of customised app

Public apps: These are apps provided through app stores and available to download by anyone. They must provide a service of benefit to anyone that downloads them, but they are also a useful way of engaging with new customers and getting visibility for your brand.

iOS (Apple) apps must be tested and approved by Apple before it will release them, and this process can take up to a month – so leave yourself plenty of time at the final stage of development.

Client (private) apps: These are offered to clients to deliver information specifically tailored to them. You can provide a secure login, which allows you to provide access to the information you wish to share and appropriate updates for that person. If the client is of significant value you could potentially provide the branded device too.

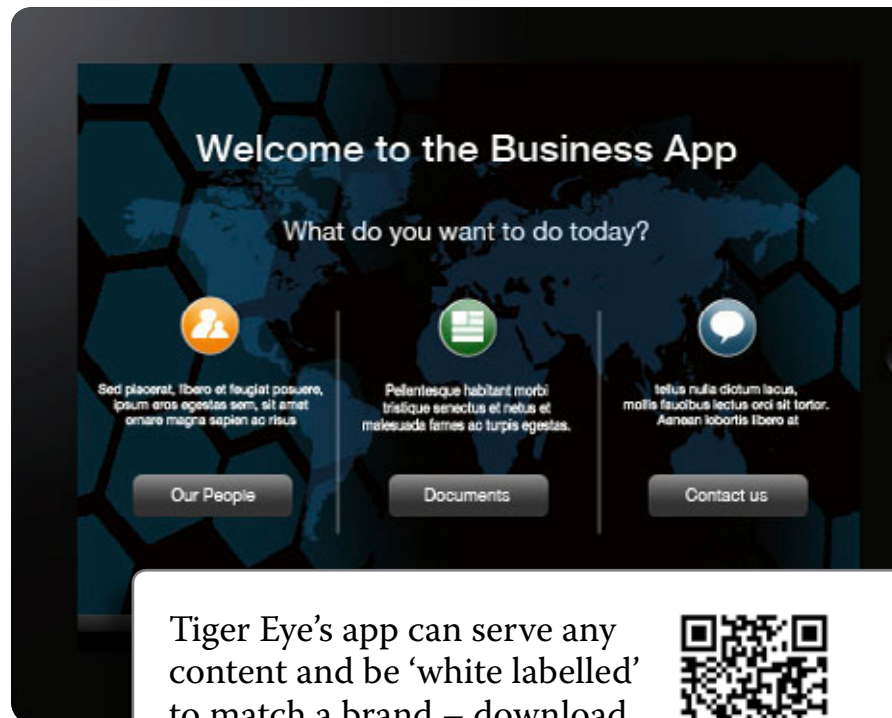
Corporate (internal) apps: These are specifically written for use within the firm by staff members and distributed by IT without the need to distribute via an app store. It's possible to ensure that only known internal devices can use it.

If you think your law firm could use one or more of these app models, your next decision relates to its specific functionality. What do you want the app to do?

Do you want to use it to explain and display your talent, deliver documents to your clients, or allow users to search a database – such

as your office and personnel information, or precedents?

There are many options available – as usual, the answer depends on your budget. We've developed a subscription-based model, which makes developing and owning an app a more affordable prospect for most companies. We think that's a good way to do it if you don't



Tiger Eye's app can serve any content and be 'white labelled' to match a brand – download it, free, to see what it can do.



bit.ly/Tigereyeapplink

Or find out more about Tiger Eye apps:
www.tigereyeapps.com

want to build your own app. Either way, the advice above stays the same.

One thing's for sure – apps are here to stay and now is a good time to begin exploring their potential for your firm.

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