



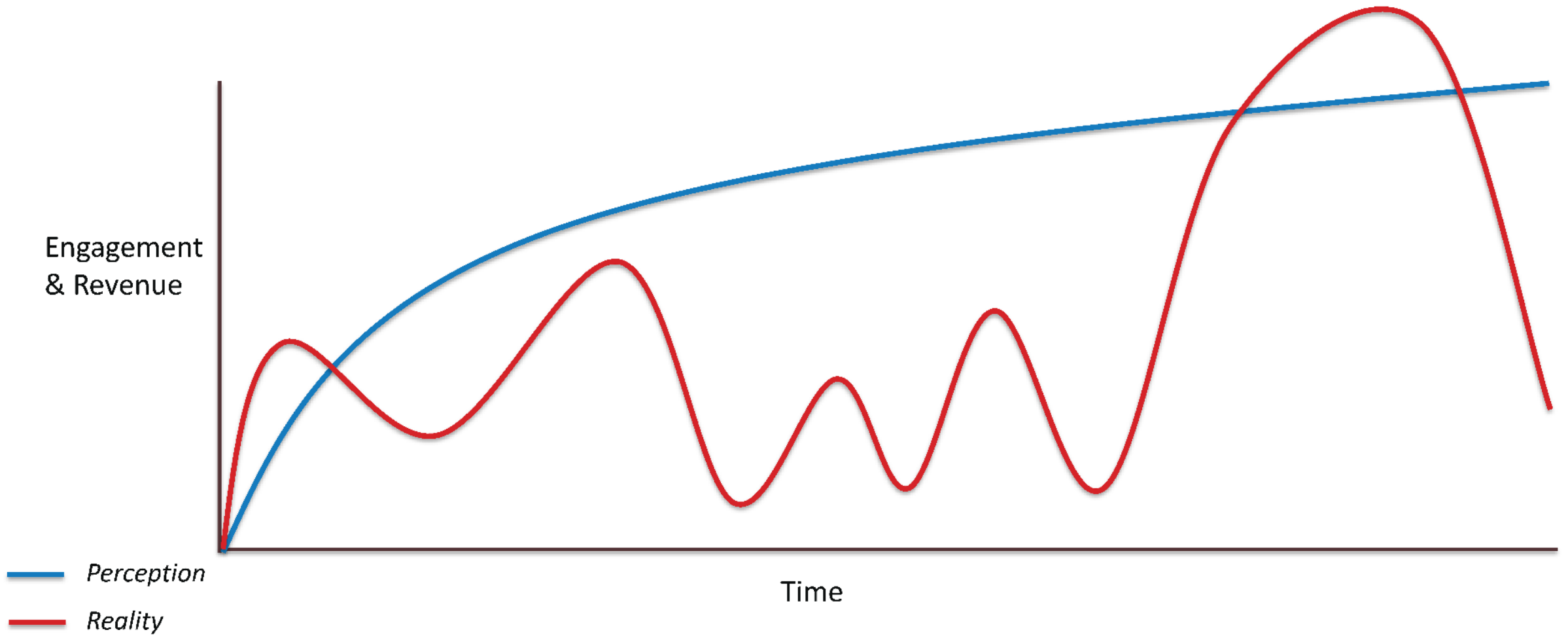
Client Lifecycle Management

“Actively shaping a client’s journey from considering, purchasing and using through to staying loyal to your firm’s product or service.”

Actionable timely information.

April, 2018

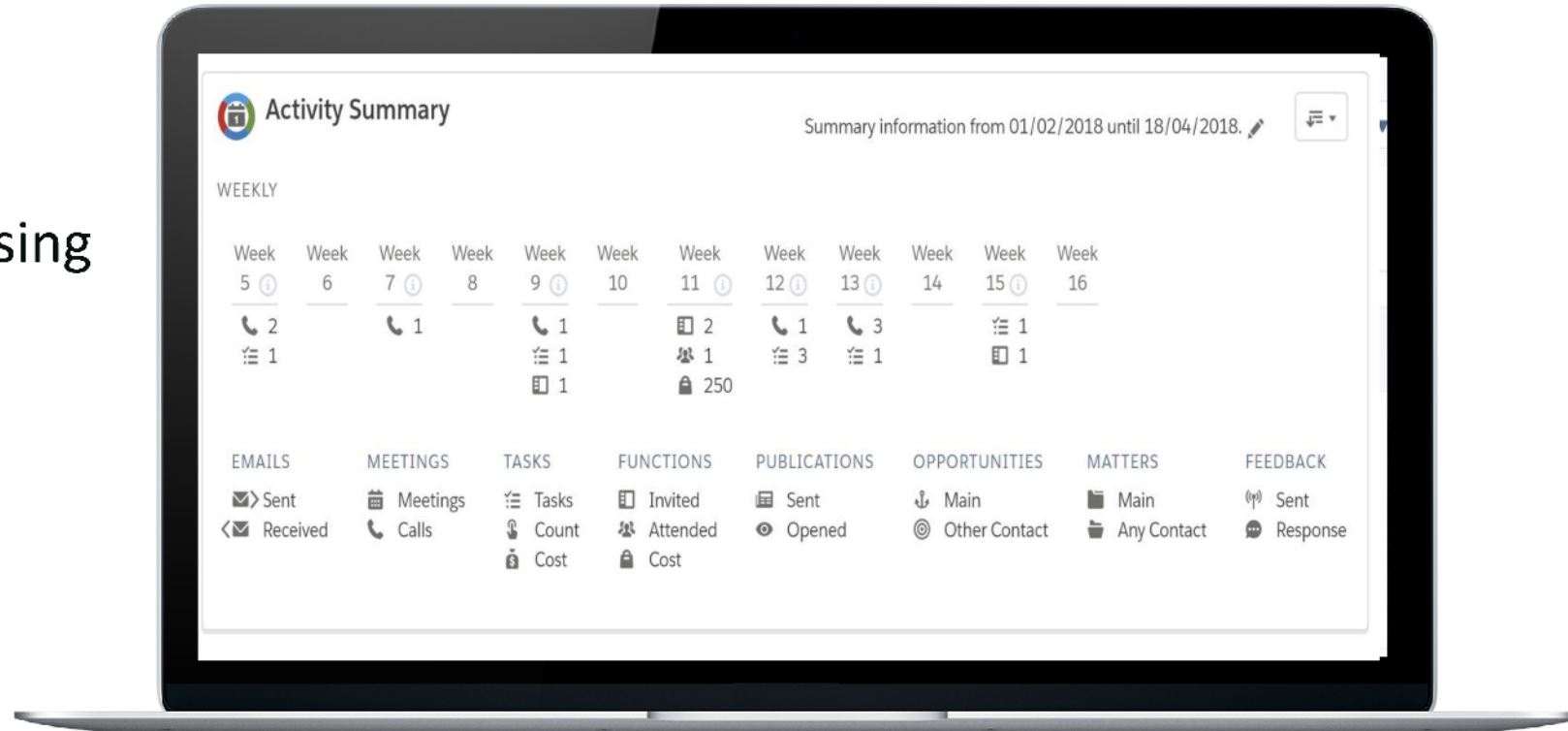
Guy Phillips
Sales Director - OnePlace



- End of Matter (death valley)

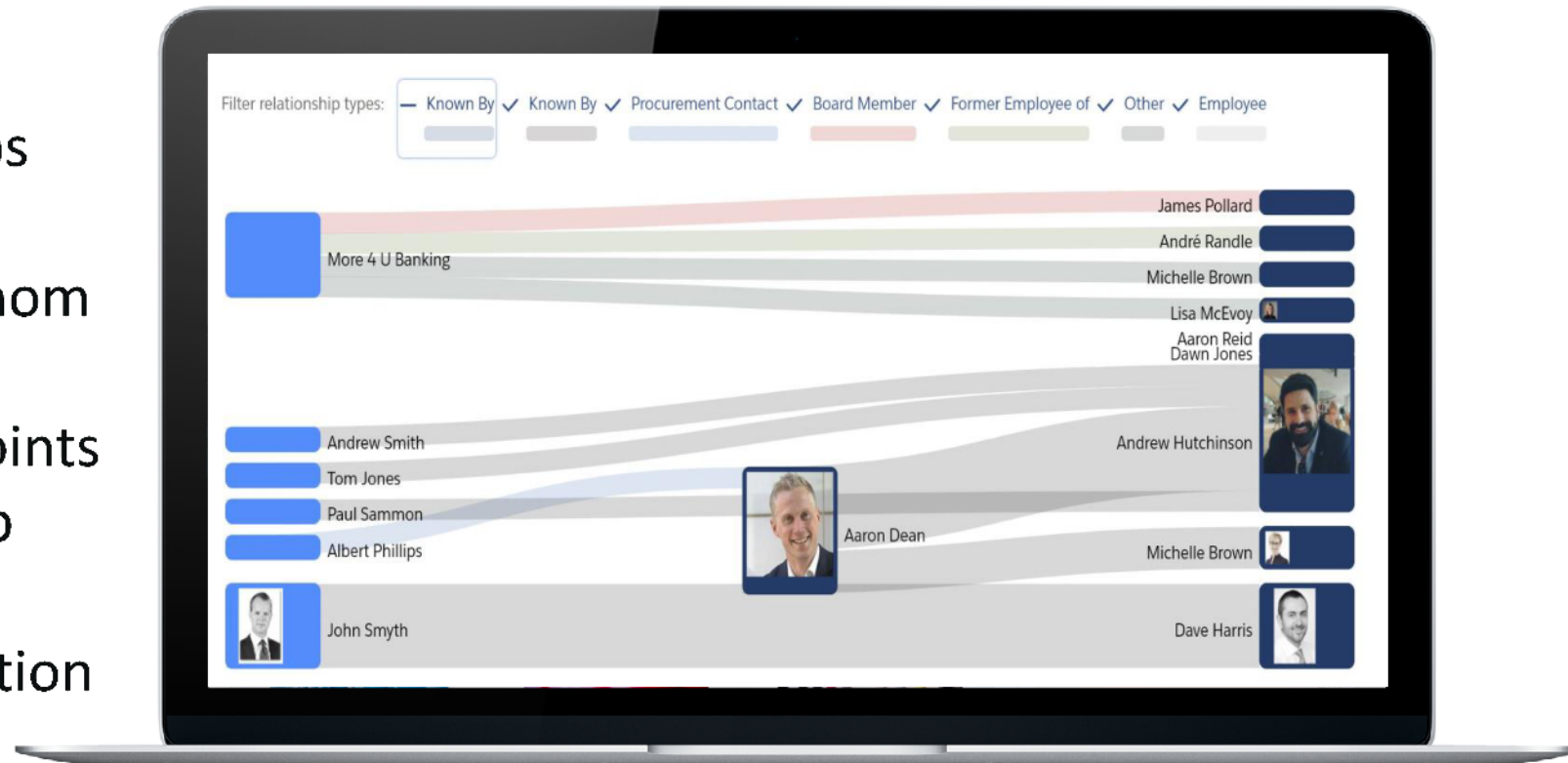
- Pro-active client engagement using inactivity reporting

- Use multiple channels of engagement



Managing client related risks - *relationships*

- Strength of relationships
- Number + type of relationships
- Understanding who knows whom
- Key client plan, minimum 3 points on either side of the relationship
- Retirement/Leaver risk mitigation



🕒 Declining Revenues

🕒 White Space

(risk to existing practice area business)

🕒 Poor Payment history

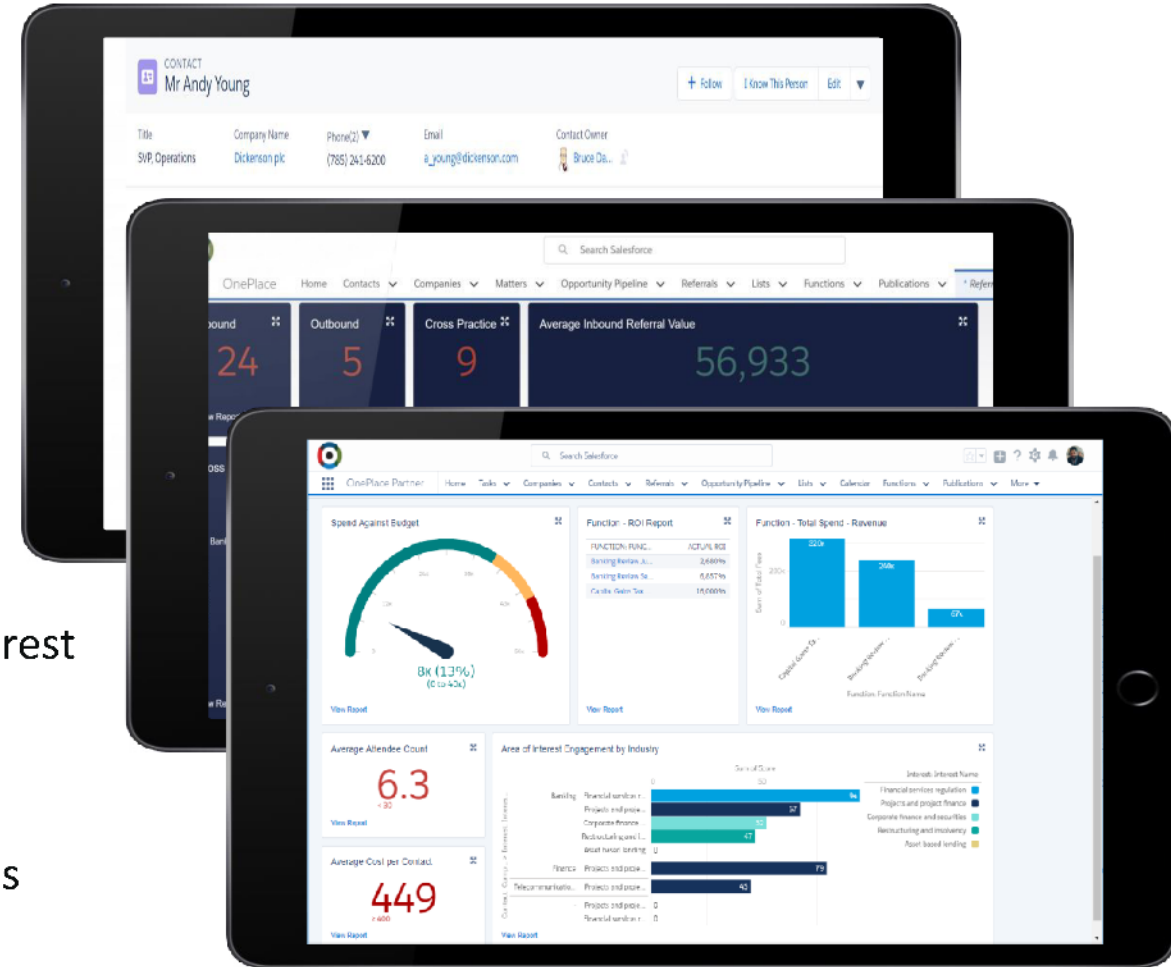
🕒 Set up an early warning process with finance.



Growth opportunities – profiting from information



- Client mapping (who, what, why?)
- Identification of similar prospective clients
- Targeted marketing
- News & Data sources, M&A
- Feedback – areas of interest, build scores from click through
- Targeted Event invites, referral partners, high score area of interest
- Measure Marketing & BD performance, show your value.
- Relationship intelligence, job change, title change, Directorships



Suggested takeaways (be focused/targeted)

- ◉ Map a key client – Research a similar company(s) – Find a differentiator – Target the company(s) – Engage?
- ◉ Research a key client – identify spend by practice area – identify white space – engage client manager
- ◉ Create a League Table of ‘Best Cross-Selling lawyers’
- ◉ Identify key ‘referral partners’ by revenue introduction – run an awareness event to increase relationship / engagement
- ◉ Introduce a structured engagement model for Key Clients, avoid ‘death valley’!
- ◉ Build out areas of interest to help targeted marketing
- ◉ Run a retirement planner to mitigate client retention risk

Thank you!

Guy Phillips - Sales Director
OnePlace

Guy.Phillips@oneplace.global

+44 7900 695586