Managing

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Involving Associates in Business Development

Should your firm include its associates in business development efforts? The answer is a resounding *yes*—for several reasons.

First, the people now sitting in your associates' chairs are your firm's future rainmakers. And rainmakers are not born; they are developed. They need opportunities to learn and hone their business development skills.

Second, but just as important, associates want client contact—it motivates them and gives them the feeling of responsibility and involvement that, in turn, gives them a greater sense of belonging and work satisfaction. When you involve associates in business development, you send the message that you clearly see a place for them in the firm's future.

In addition, most firms consider the ability to bring in business when making partnership decisions. Providing associates with the time and opportunities to develop gives them a greater chance of producing—and making partner—in the future, thereby helping to expand the firm's practice and increasing firm revenue.

Associates at all levels—senior, junior or midlevel—can be part of your business development plan. Take a minute to consider the primary ways new business comes through the door:

- New business from old clients
- Word-of-mouth referrals
- The strength of the firm's name and reputation in the community

Let's look at how associates at each level might be involved in each of these areas of client development.

Action Plan

- ☐ Create a firm business development strategy that includes individual business plans for each partner.
- ☐ Create a client relations philosophy and training program for all employees of the firm.
- ☐ Introduce associates to clients and prospects, and increase the depth of their involvement in case management as their experience levels grow.
- ☐ Inform all associates of your firm's business development strategy and how they will be involved at each stage of their careers.
- ☐ Meet with associates individually to discuss their contributions to firmwide business development.
- ☐ At the midlevel, assist associates with developing their own business plans in conjunction with the firm's overall plan and strategy.

Junior-Level Associates: Growing Client Relations and Referral Sources

Because strong client relations and good service are the main reasons clients return, junior-level lawyers (those zero-to-three years out of law school) must learn the importance of dealing with clients in a professional, courteous, effective manner. The same holds true for all others in your firm, from receptionists to senior partners. Train everyone how to properly answer the phone and greet clients when they come to your office. Do not assume that employees know this information. It can mean the difference between clients switching their legal services or remaining with your firm.

Whenever possible, introduce associates to clients whose matters they are working on—and include junior lawyers in client meetings, even if you can't bill for their time during those meetings. Establishing relationships between your associates and clients, and building clients' confidence in the associates, allows for greater service to clients and helps associates learn how to interact with clients by watching *you* in action.

Also, junior associates need to start building a referral base. Take them with you to bar association and other, appropriate organization meetings so they can begin to meet others in the business and legal communities. Encourage and support their involvement in bar activities. Their goal: to create future referral sources.

To help your firm's name become better known, junior associates can also draft articles for relevant publications, such as local bar or business newsletters. They can also contribute to firm or practice group newsletters that are sent to current and prospective clients and referral sources.

Midlevel Associates: Increasing Involvement

To midlevel associates (those with four-to-six years of experience), you can give greater responsibility for client contact and case management. In most circumstances, midlevel associates can be the main contact for a client's matter. This frees up your time and enables the associate to establish himself or herself as the go-to person for the client. In turn, the client will feel comfortable calling the associate with future legal needs, as well as referring acquaintances.

If possible, include midlevel associates in meetings with prospective clients. This enables you to teach them, firsthand, how to talk with potential clients and how to "close the deal."

Also, encourage midlevel associates to increase their participation in organizations such as the local chamber of commerce and other business groups. Associates' peers in other industries are the future decision makers for their organizations, creating terrific avenues for future business for the firm.

In addition to contributing to different publications to expand the firm's reputation, midlevel associates can create seminars in their areas of expertise, which can then be offered to groups around the community.

Lastly, at the midlevel stage an associate can begin a personal business development plan that includes (1) goals for her or his practice and (2) ways to meet those goals. For example, an associate might want to add clients from a certain industry to his practice and can plan these steps to accomplish that goal:

- Becoming active in a specific organization that includes industry members
- Writing for industry publications
- Gaining greater expertise in the particular industry's legal needs

It's important that associates' business development plans be reviewed with their supervising partners on an annual basis. In that way, the partner is aware of the associate's goals, can use the firm to support those goals and can make sure the plan is coordinated with the firm's larger, overall business development plan.

Senior Associates: Seeing the Results, Today and Beyond

At this stage of their careers (usually seven-to-ten years of experience), associates should have complete responsibility for their own caseloads. Apart from that, or perhaps part and parcel with it, they can begin to bring in new clients to the firm.

Much of senior associates' business development time will be involved in servicing current clients, meeting with prospective clients, entertaining referral sources at breakfast or lunch meetings and actively participating in organizations that could lead to new business. Also, they may be taking on leadership roles in bar, community and other organizations. Some may even be working toward leadership positions within the firm.

If your firm commits to including associates at *every level* in its business development, the result will be lawyers who feel increasingly strong connections and commitments to the firm—lawyers who will be contributing members to the firm's future profitability and its long-term success. ■

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