

legal service providers

# Pitching for commercial business

The difference between a well-thought out and generic presentation can be the difference between winning the work and not being considered. Andrew Heslop gives some pointers

**'WE'VE NO TIME** for all that gimmicky sales nonsense. We provide an exceptional service and we let that speak for itself. Our clients appreciate what we do'.

This advice was offered to me by a rusty-old-sage of a lawyer while I was in the process of selecting a panel of legal services providers for a large organisation.

The first retort that came into my head was, 'I'm glad your clients are appreciative because with that attitude we probably won't become one of them'.

However, I thought this might be a little inappropriate and by the time my mouth had caught up with my brain I heard myself saying, 'well, what about people who aren't your clients? How does your exceptional service make itself heard to them?'

## Selling generates revenue

The notion of selling can conjure up negative images of sharp-suited people trying to make you buy things that you do not want or need. But this image is not really helpful. After all, selling is the only commercial activity that generates revenue – everything else merely creates cost – and this applies to your firm as much as any other business.

In fairness, a number of larger law firms have recognised the importance of improving the selling skills of their partners, but in my view even they lag behind other professional services businesses in this respect. How have I reached this conclusion?

Through having spent 20 years buying on behalf of large organisations – from ASDA to the Conservative Party – including the procurement of professional services, legal and otherwise. In short, I represent the guy on the other side of the desk.

And increasingly, when selecting providers of legal services, people like me are ensuring that clients are going to competitive pitch. In competitive situations I believe that about 75 per cent of people – and firms – perform poorly. You may of course be one of



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the 25 per cent who handle things well, but three out of every four of your colleagues will not. So, if what follows is obvious to you consider putting the article in front of them (just be careful with the managing partner as I have identified no positive relationship between sales skills and seniority).

Articles such as this one tend to be structured around 'get rights' or 'top tips for successful pitching'.

But at the risk of appearing contrary for its own sake, it might be useful to highlight the 'get wrongs'; the unhelpful things that lawyers (and other professionals) are often seen to do in competitive pitch situations. Then, as you eat your cornflakes, stare out of

the train window or fiddle with the stress-buster toy on your desk, you can reflect on how many of these traits your firm might have to plead guilty to.

## The 'get wrongs' when itching for business

**We sell expertise and time**

During a recent workshop I asked a group of newly appointed partners in a law firm what they were actually selling. 'Professional skills', 'expertise' and 'time' were the more popular answers.

This is not surprising, after all, the long years of studying and gaining experience are there to hone your legal and wider business

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skills, and the partners in your firm will be pretty obsessed about time and utilisation. When I pointed out that 'solutions to my, that is the clients problem' are actually what I am buying – and by logical extension therefore what you should be selling, there was a communal murmuring of, 'well, that goes without saying'. But no it does not go without saying at all. It needs to be said and understood.

As a buyer, I have no interest in your time or professional skills, other than to the extent they solve my specific problem. Clients are extremely selfish – but it is their money. When preparing to pitch for work constantly remind your self of the fact that 'it's about them'.

Therefore finding out exactly what the client wants, and taking some quality time to demonstrate why you are uniquely placed to provide it, is the only sensible approach. I guess few people would disagree with this proposition, but then why do 75 per cent of people fail to do so?

### Materials are not important

The biggest law firms generate mounds of literature, often in the form of client sector-focussed analysis or an exploration of new legislation. This is good. What is not good is bundling about three kilograms of this material together along with a whole raft of other generic information, and presenting it in two blue-leather binders.

Would it not be much better to prepare a short and focussed document (oh, go on then, PowerPoint presentation if you absolutely must) where each sentence is focussed on the specific needs of the client?

The materials you use to support your bid are of crucial importance but the client does not have time to sift through the detritus to find the relevant bits.

The quality of materials is less influenced by the style of graphics used (or your newly designed logo), and more by clarity and relevance of content.

One of the best ways to improve any pitch is to improve the content. Oh, and do not just take the proposal that worked last time and modify that. Clients are unique even if their legal problems are not. This point is discussed in more depth later.

### We do not like PR and all that spin

Public relations has a bad name. I put this down to politicians and the celebrity press.

I hate to admit this, but I am influenced by what I read about suppliers – especially when the supplier in question provides services as important and complex as legal



advice. But forget the term PR, think in terms of market positioning and reputation instead. If you aspire to be the regional legal services provider of choice to larger businesses in the area, it helps if you are widely known and seen as experts on matters of commercial law.

I realise that client confidentiality means that you cannot afford headlines such as: 'Biggins Bungle Law LLP today announced it has produced the share sale documents for the £20m sale of Battletown Waste Disposal Ltd, and did the buyer up like a kipper'.

However it is still possible to build a solid reputation by influencing what is written about your firm. My problem requires your expertise. Build your reputation for expertise via effective market positioning.

### We do not need a formal pitch process

It seems that when invited to pitch for a specific piece of work, most firms leave the request documents in the in-tray until the day before, and then hand them onto a junior member of staff to generate the detail behind the response.

Obviously, your firm cannot afford to have the most important fee earners dropping paid work all of the time to draft up the materials for the next sales pitch. Then again, can you afford not to have them do this?

After all, they are the people who are best placed to understand the client's needs, based upon experience of similar situations. Of course, you need efficient processes to help you replicate and recycle effective bid materials, but the challenge is to make each proposal uniquely address the clients (often non-unique) issues.

### Poor standardised materials

If you fob people like me off with obviously recycled standardised materials we will spot it immediately and be offended.

Perhaps the most important piece of advice from 'the other side of the desk' is this: my job is to screen suppliers and choose the best, measured in terms of value, quality, performance and risk.

Poorly presented pitches and presentational materials do not help me in this endeavour so I revert to my natural instincts and take the lowest price, having first negotiated it down even further. And that is not in anyone's interests.

Andy Heslop is an independent consultant who helps businesses buy and sell better. He is working at director level in a business that contracts £1.5bn of goods and services and is helping a leading law firm on strategies to maintain fee levels. Email: andrew.heslop@virgin.net