



# Legal Sector Breakfast Briefing

10 February 2015

This briefing qualifies for 1 hour CPD – Authorisation Ref: EKQ/ARWA

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# Legal Sector Breakfast Briefing

## Welcome

Andy Poole  
Legal Sector Partner  
Armstrong Watson

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# Legal Sector Breakfast Briefing

10 February 2015

- 8.00am - Arrival and breakfast
- 8.30am - Welcome
- 8.35am - Briefing – Solicitors Non-Technical Skills
- 9.30am - Q & A
- 10.00am - Close

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# Why solicitors non-technical skills are more important than ever & what to do about it

Legal Sector briefings

10<sup>th</sup> Feb Leeds

25<sup>th</sup> Feb Dumfries

Bernard Savage

Director, Size 10 ½ Boots



size 10½ boots



Why

What

How

Why



## Law firms

More savvy  
marketing &  
Business Devlpt

Focus, eg sector  
specialisation

Increased  
innovation





## Business environment

Relationships,  
not transactions

Professional  
procurement

More emphasis  
on added value





## Buyers behaviour

Less loyalty to  
advisors

Higher  
expectations of  
client care

More rigour in  
buying practices

What



# Marketing & Business Development

'Intelligent  
Marketing'

Client  
Relationship  
Management

Client Value  
Proposition





# People & Culture

Leadership behaviours

Non technical skills development

Firm values

**IF YOU FAIL  
TO PLAN  
YOU PLAN  
TO FAIL**

WHAT GETS  
MEASURED



**GETS DONE**

Business  
control &  
measures

Business  
planning

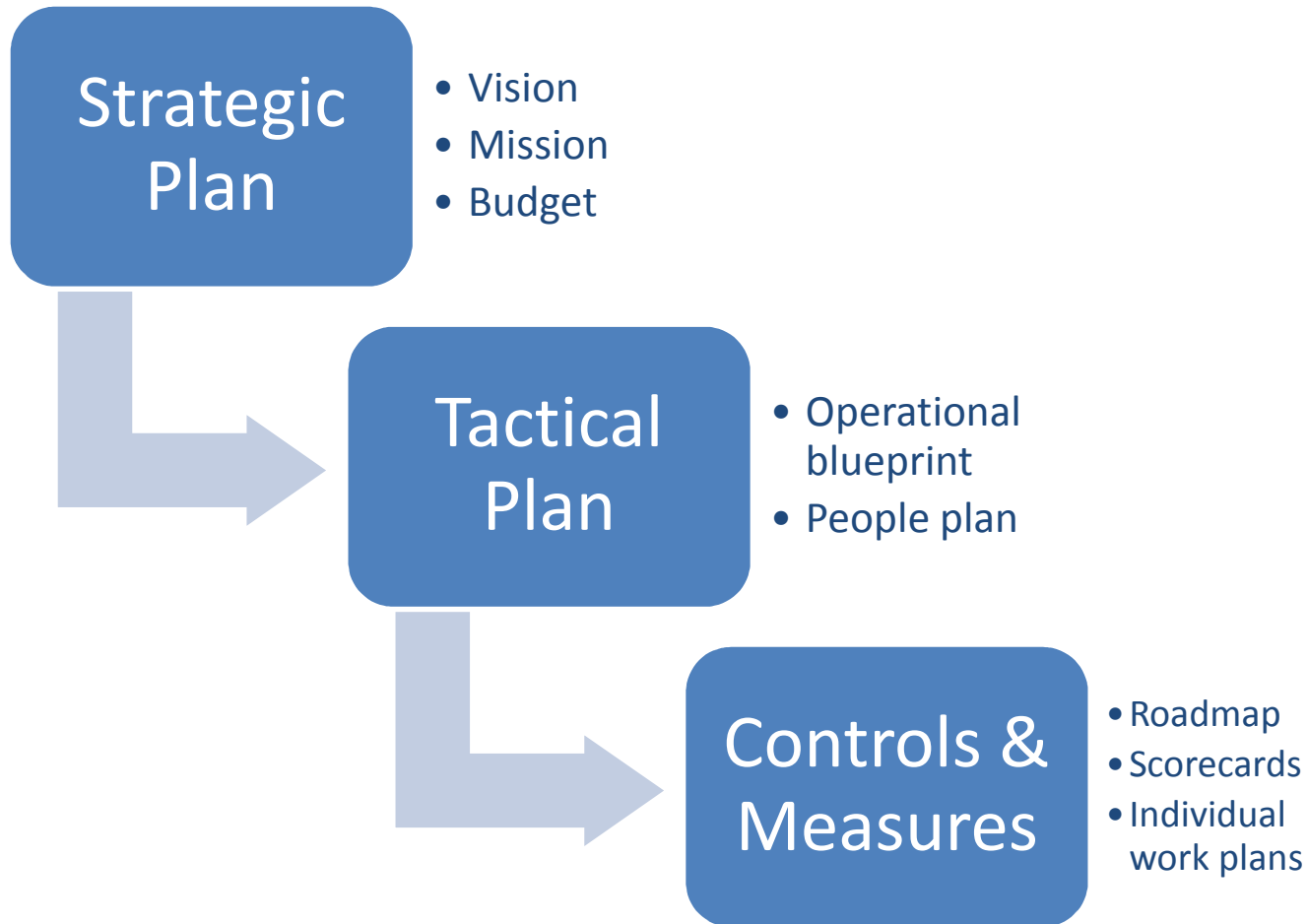
Balanced  
scorecard

'Coffee' plans

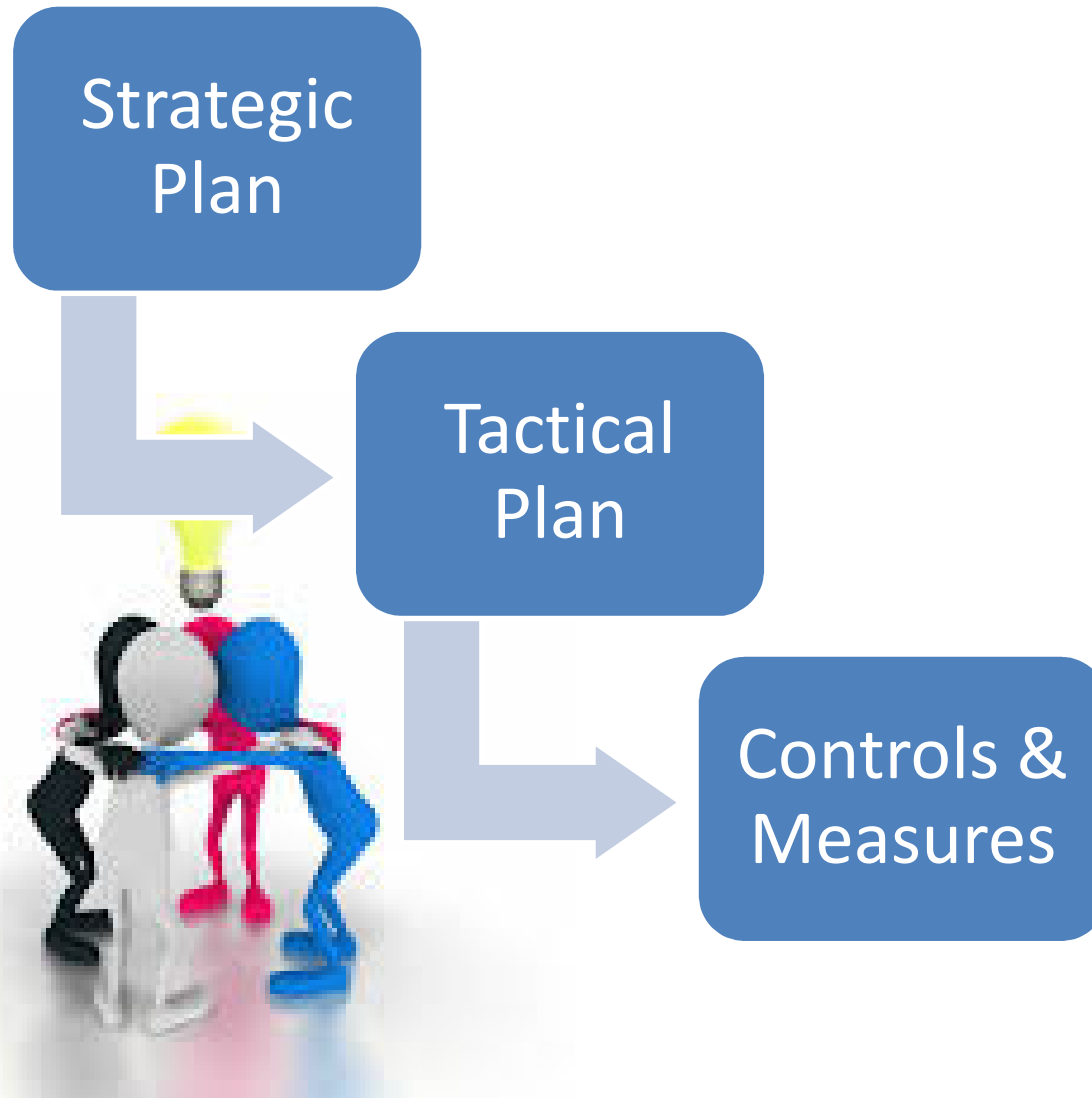


How

# A plan that effects change has 3 key components



# Communicate, communicate, communicate



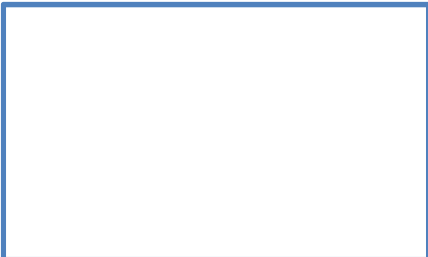
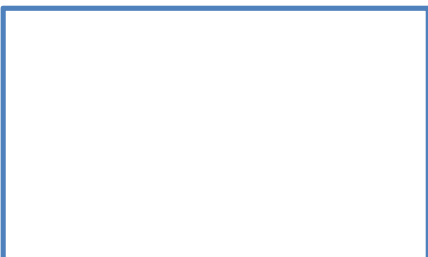
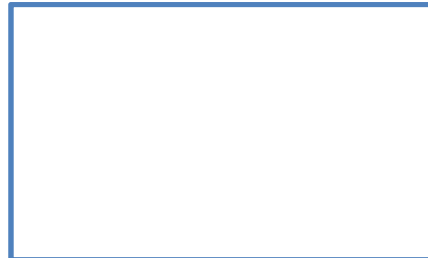
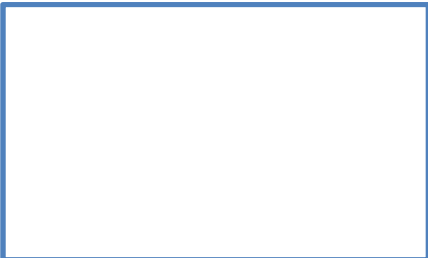
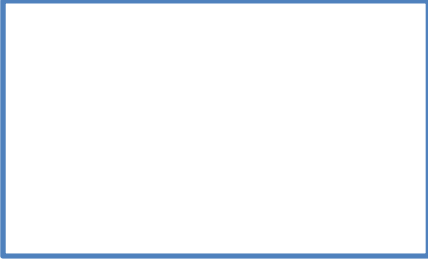
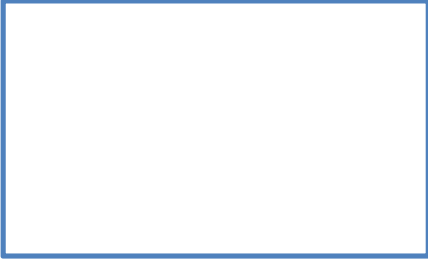


Objectives

Goals

Strategies

Measures



## Objectives

1. Maintain CoCo market dominance

2. Build profile of Private Client/ Family practice

3. Get more visible to large organisations

## Goals

Continue to focus on relationships with accountants and bankers to protect & grow position in the region

Drive awareness through networking 'under the radar' of competition

Use Palram Polycarb in house experience as model to roll out wider in the region

## Strategies

- Use Coffee Plan approach to adopt a more structured approach to manage relationships with key stakeholders
- Adopt proactive approach with intermediaries to create more referrals & win new clients

- Build relationship with x
- Leverage police family credentials to build relationship with Police Fed.
- Get closer to y with view to helping grow Police niche

- Deliver in house seminars to drive firm awareness
- Amplify marketing through local press and on line media
- Create case studies/ testimonials to use in proactively targeting businesses on Chamber list

## Measures

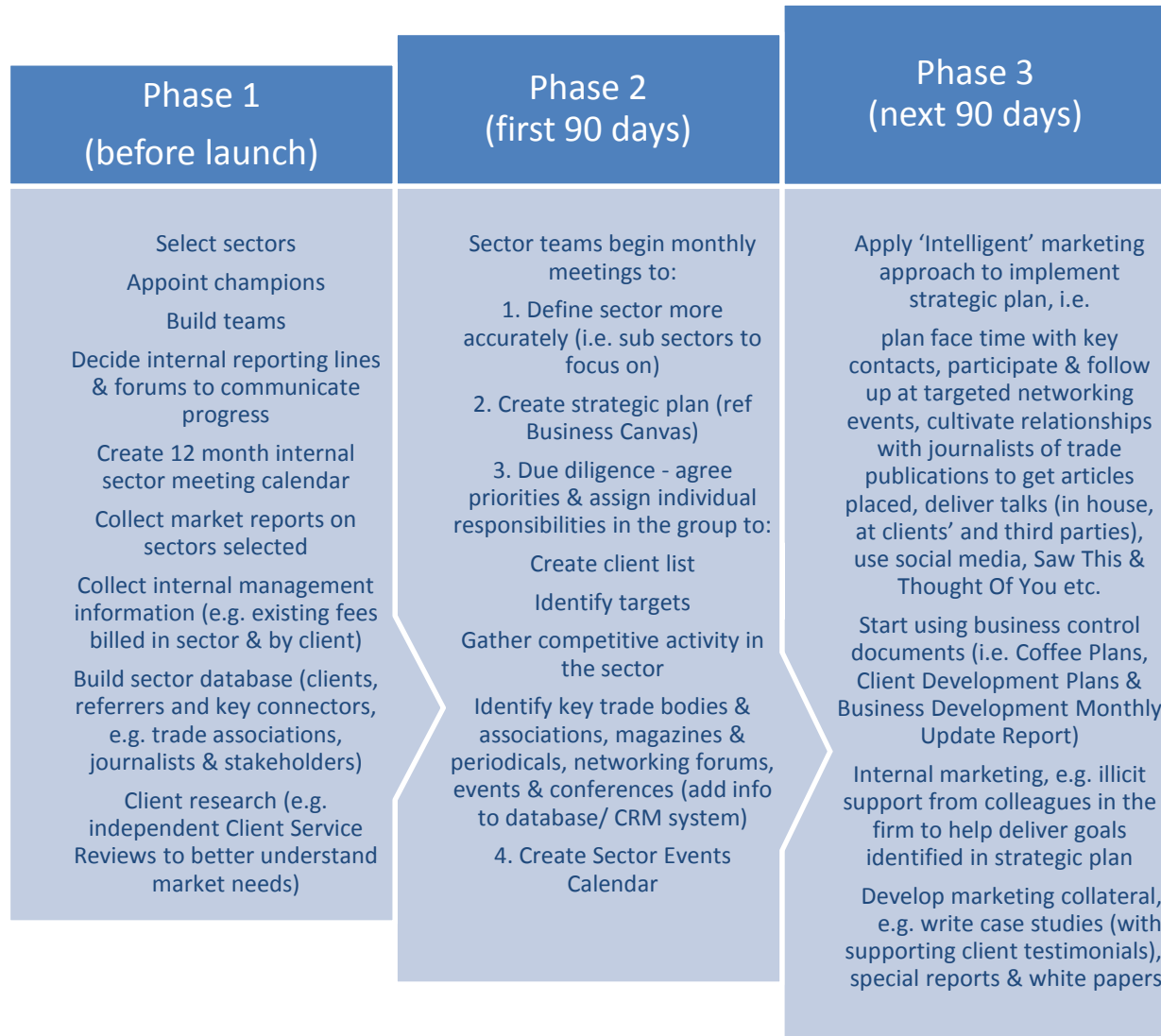
- Monitor Coffee Plan implementation & review monthly
- Track external referrals in Monthly Report & review monthly

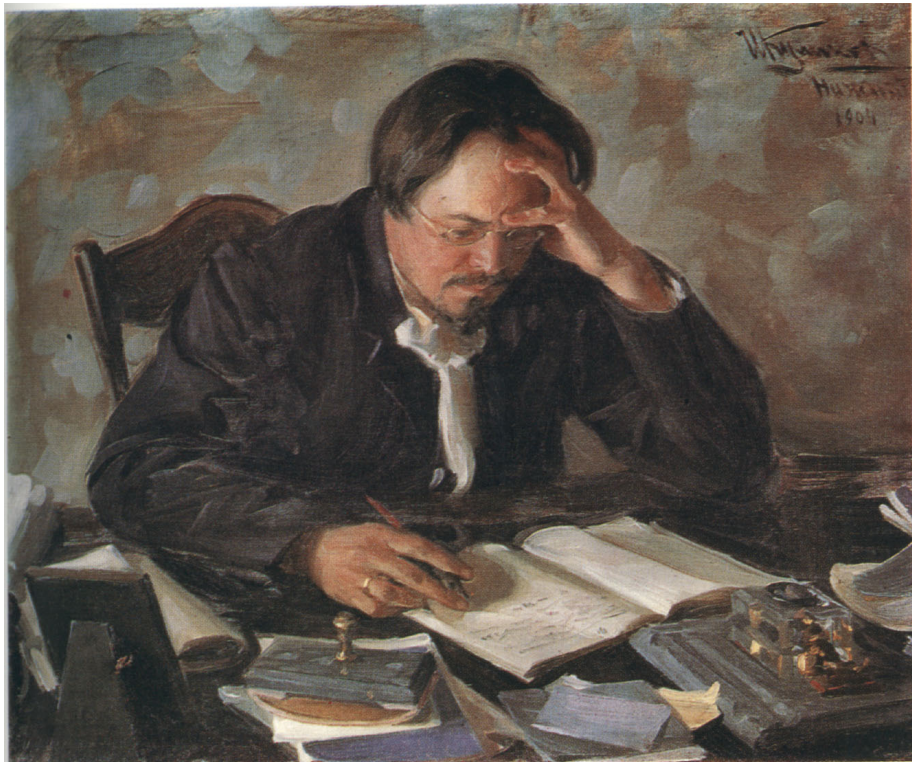
- Get buy in from x & deliver a seminar for members &/or get published in in house publication
- Identify opportunities to build visibility in Police Federation & implement

- 1 in house visit per quarter
- Quarterly meetings with local journalists to share stories
- Add targets to Coffee Plans & track implementation

**example**

# Tactical Plan (Actual): Sector Implementation





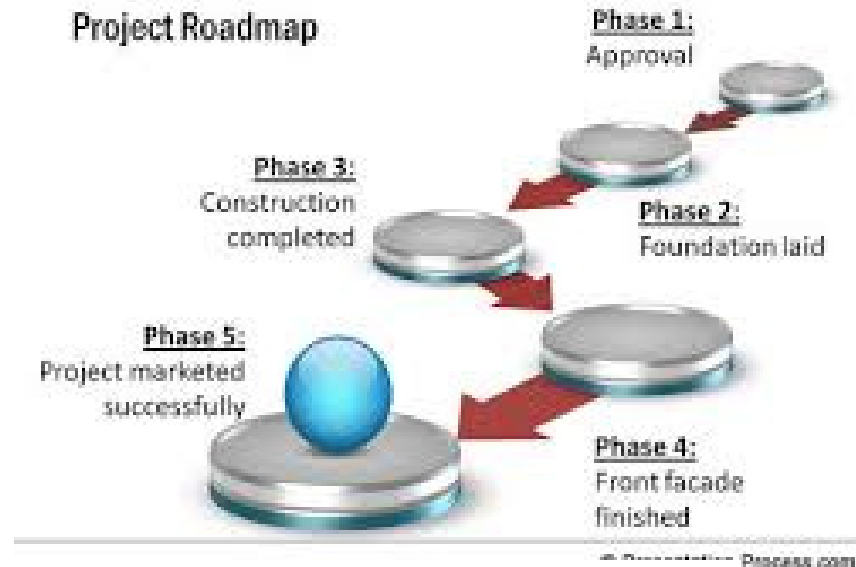
# Creating a Road map

## Step 1: 'The Business Canvas'

Client segments	Client Value Proposition	Key resources	Channels	Existing relationships	Key activities	Required new relationships
What sub groups exist within each sector?	How does your firm best add value?  What are your key messages?  <b>How will you communicate this message?</b>	What will you need to deliver budget?  People  Budget  Marketing collateral  Due diligence (client, desk and market research)	Where will work come from?  Existing clients (upselling & cross selling)  On line enquiries?  Referrals?  Direct marketing?	How are you going to stay visible to key clients and referrers?  'Coffee' Plan  Client Development Plan	Intelligent Marketing tactics  Events calendar  Networking  Social media  Seminars (in house, client & third party)  Media plan	Who do you need to influence (Key Business Individuals)?  Clients  Referrers  Targets

# Step 2: Create visual representation to engage staff & break down delivery in to bite phases

**example**



# Controls & Measures must be SMAC

SPECIFIC

MEASURABLE

ACHIEVABLE

COMPATIBLE

# Track face time with clients & referrers

	J	F	M	A	M	J	J	A	S	O	N	D
1												
2												
3												
4												
5												
6												
7												
8												
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10												
11												
12												







WHEN

WHO

WHAT

?

HOW

WHY

WHERE

## **Bernard**

T: 0777 189 7772

E: [bernard@tenandahalf.co.uk](mailto:bernard@tenandahalf.co.uk)

## **Douglas**

T: 0778 654 0191

E: [douglas@tenandahalf.co.uk](mailto:douglas@tenandahalf.co.uk)

## **Office**

T: 0115 969 9817

E: [info@tenandahalf.co.uk](mailto:info@tenandahalf.co.uk)

W: [www.tenandahalf.co.uk](http://www.tenandahalf.co.uk)



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## Questions and Conclusion

Simon Coatsworth  
Chief Executive  
Zenith Chambers

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*we're with you...*