



ArmstrongWatson[®]

Accountants, Business & Financial Advisers

A track record of providing solutions to the legal profession

Legal Sector Breakfast Briefing

Carlisle

11 February 2021



ArmstrongWatson[®]

Accountants, Business & Financial Advisers



Legal Sector Breakfast Briefing

Welcome and Introduction

Andy Poole, Legal Sector Partner
Armstrong Watson



Legal Sector Breakfast Briefing

- 10:00 - Welcome
- 10:05 - Briefing
- 11:00 - Q & A
- 11:30 - Close



Maximising Client Advocacy & Business Development Effectiveness

Jim Thomas
PDW Group (UK) Ltd

jimt@pdwgroup.co.uk | +44 (0) 115 940 4966



Overall
Business
Success



Higher
Profits

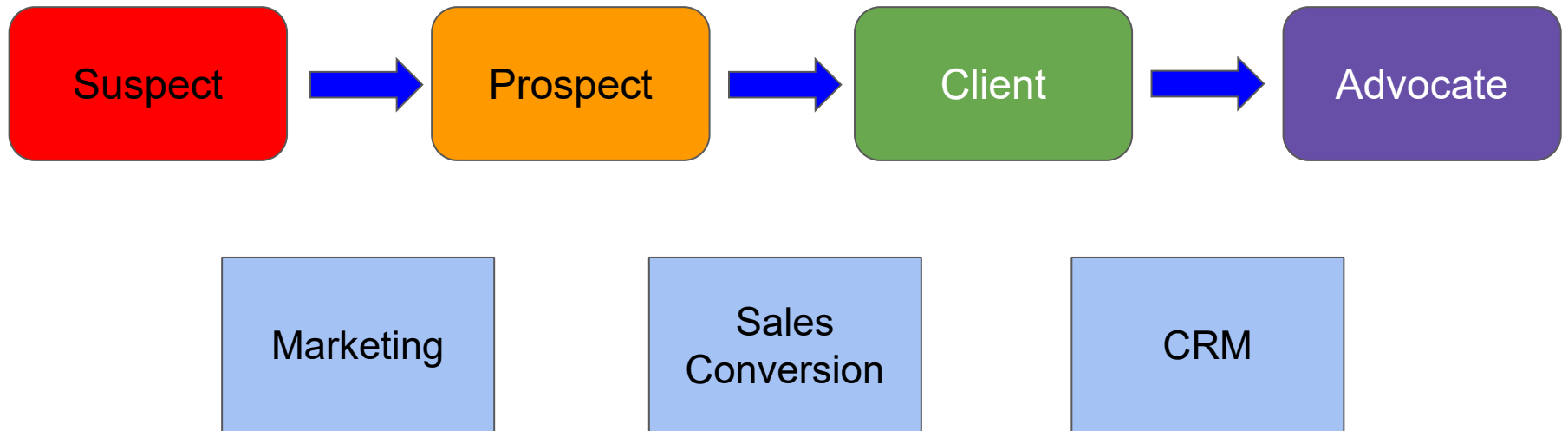
Our Core Philosophy



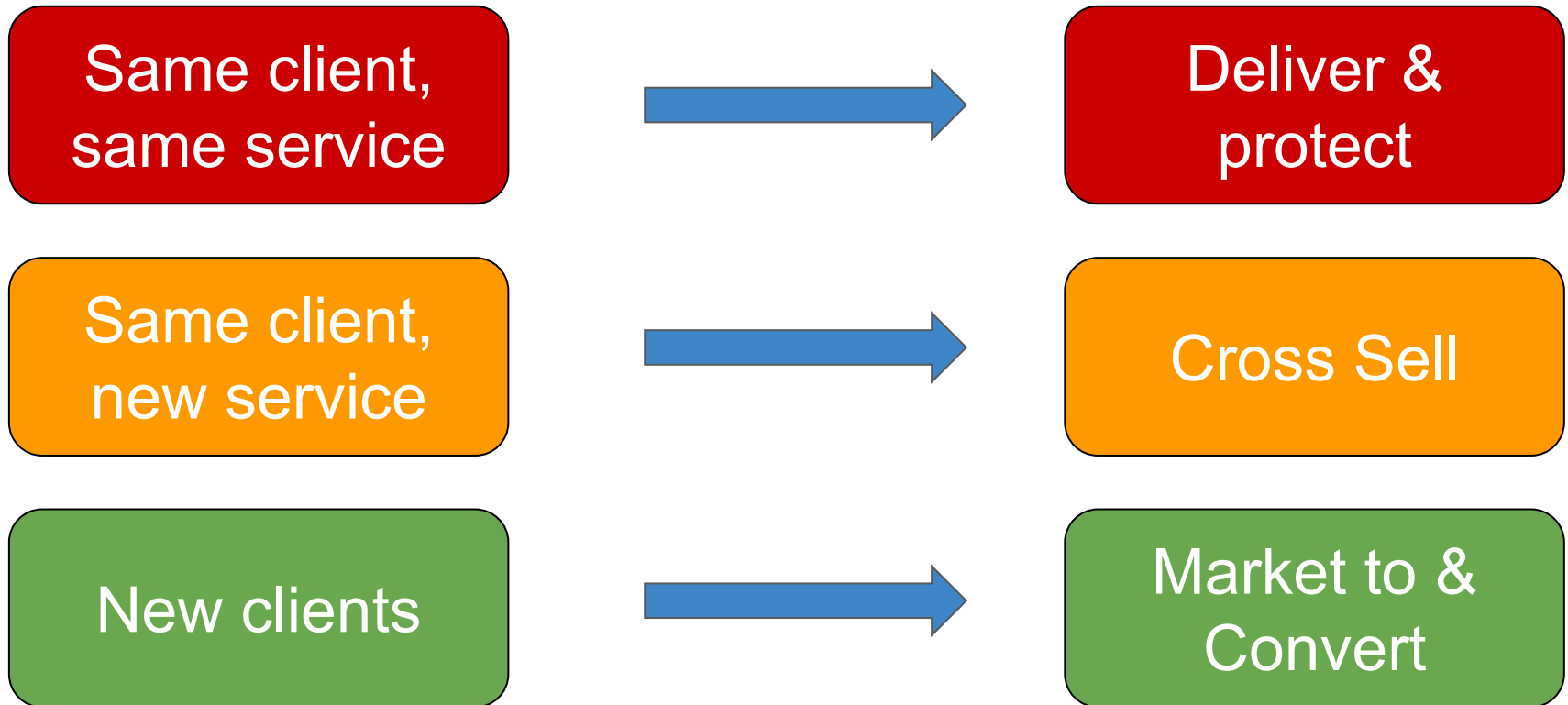
Your Clients?

- Private client - individuals
- Companies & organisations - End Users
- Companies & organisations - In House Legal Teams

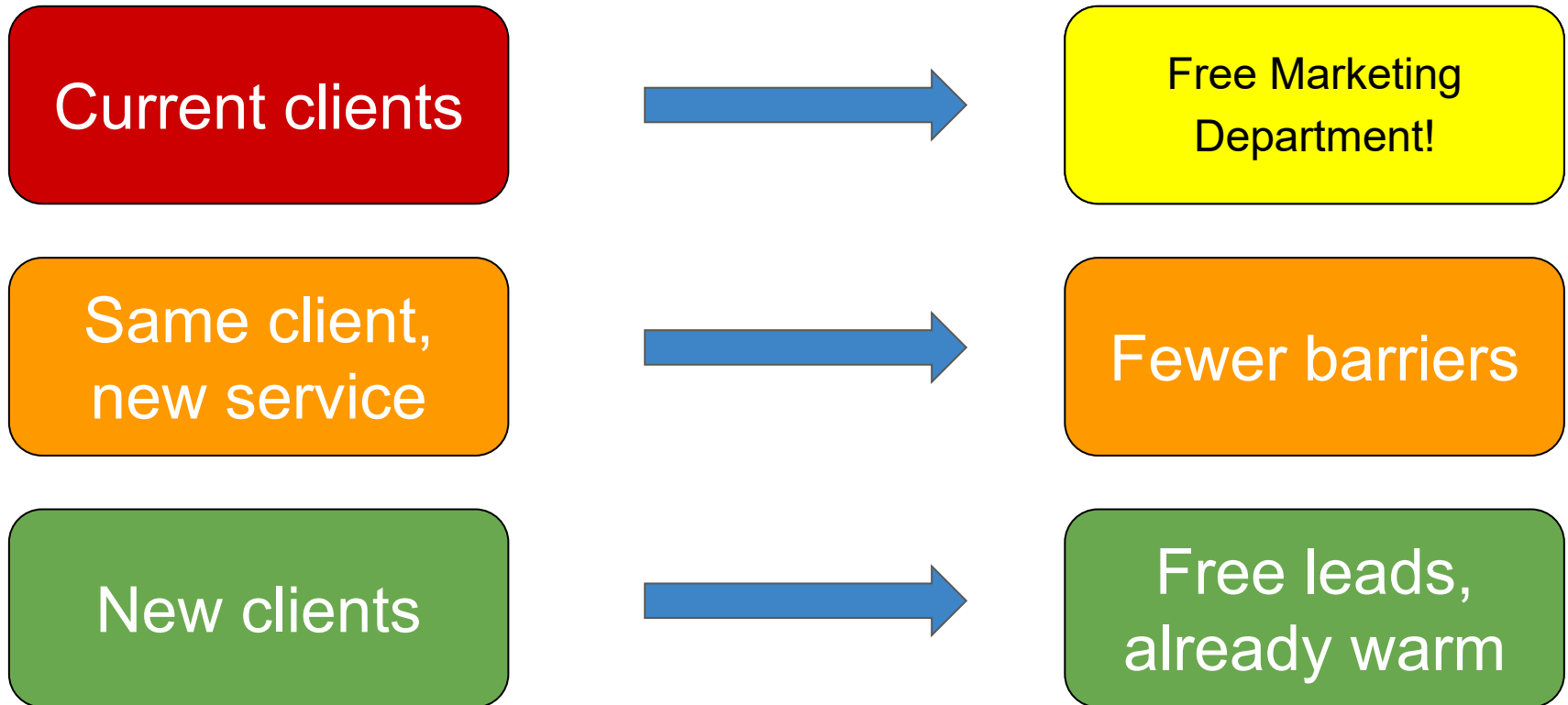
Client Lifecycle



Revenue Streams



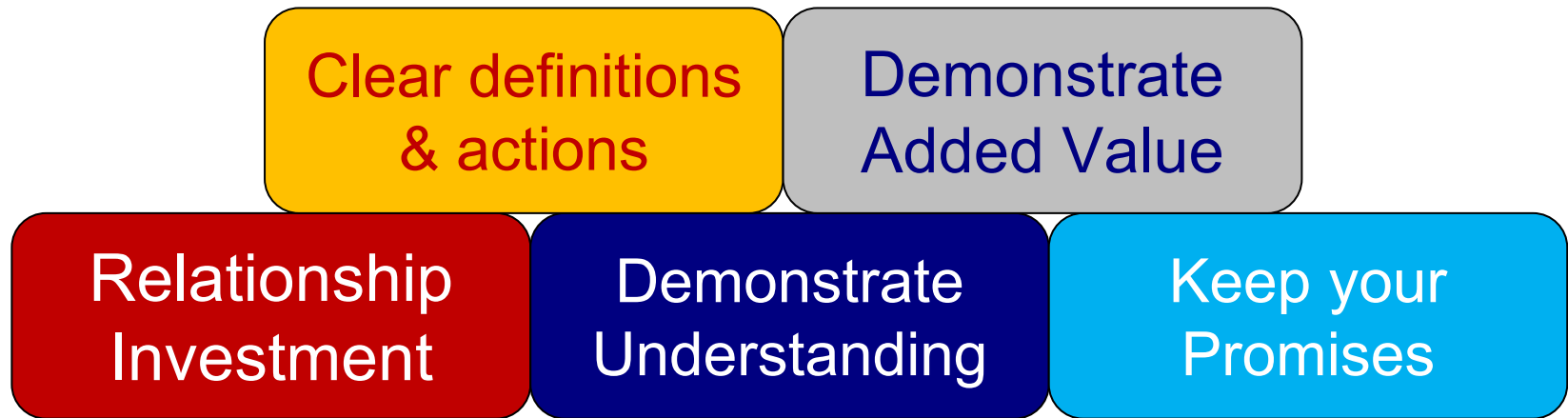
Advocates & Revenue Streams

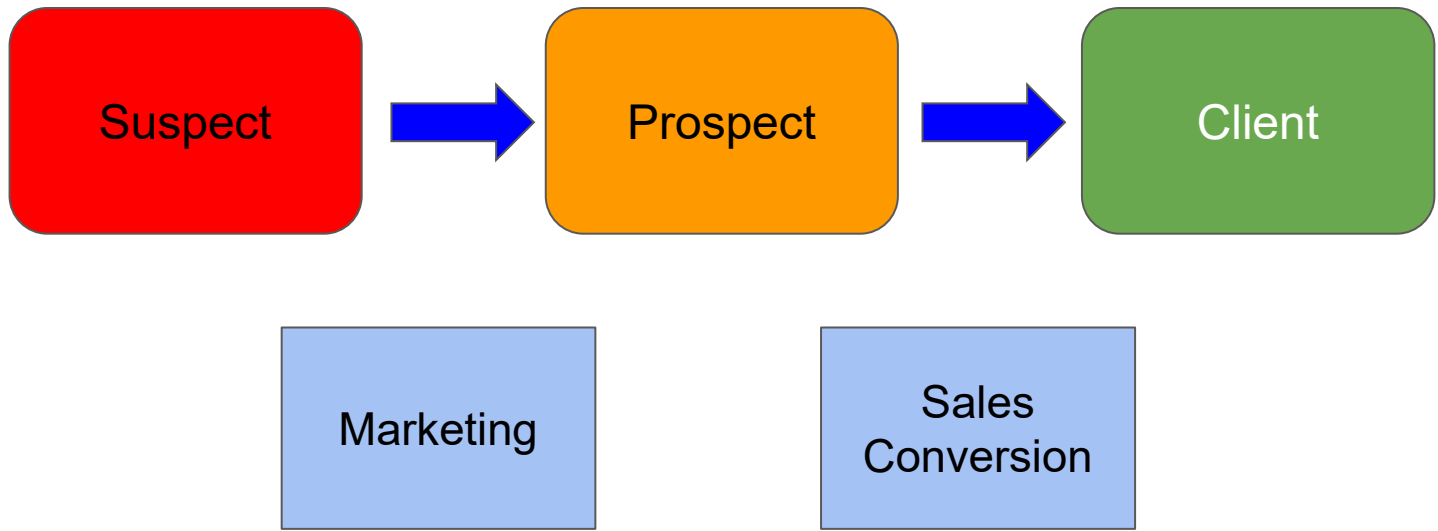


Building Advocacy

- How do we measure advocacy?
- What do we do with the data & insights?
- How to do we actually improve advocacy in our client base?

The Five Pillars of Advocacy



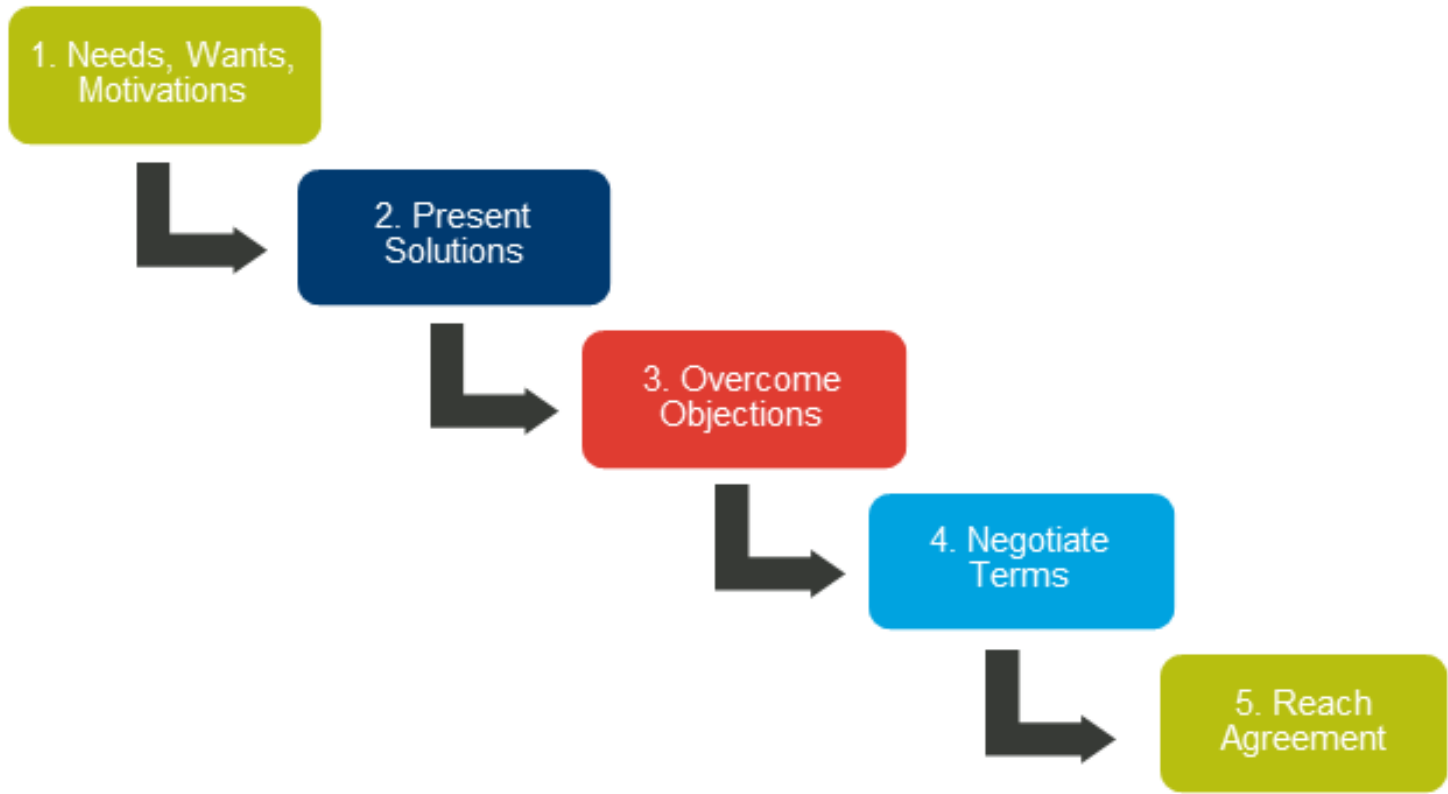


Marketing

- Central or Practice Marketing
- Personal Marketing

Sales Conversion

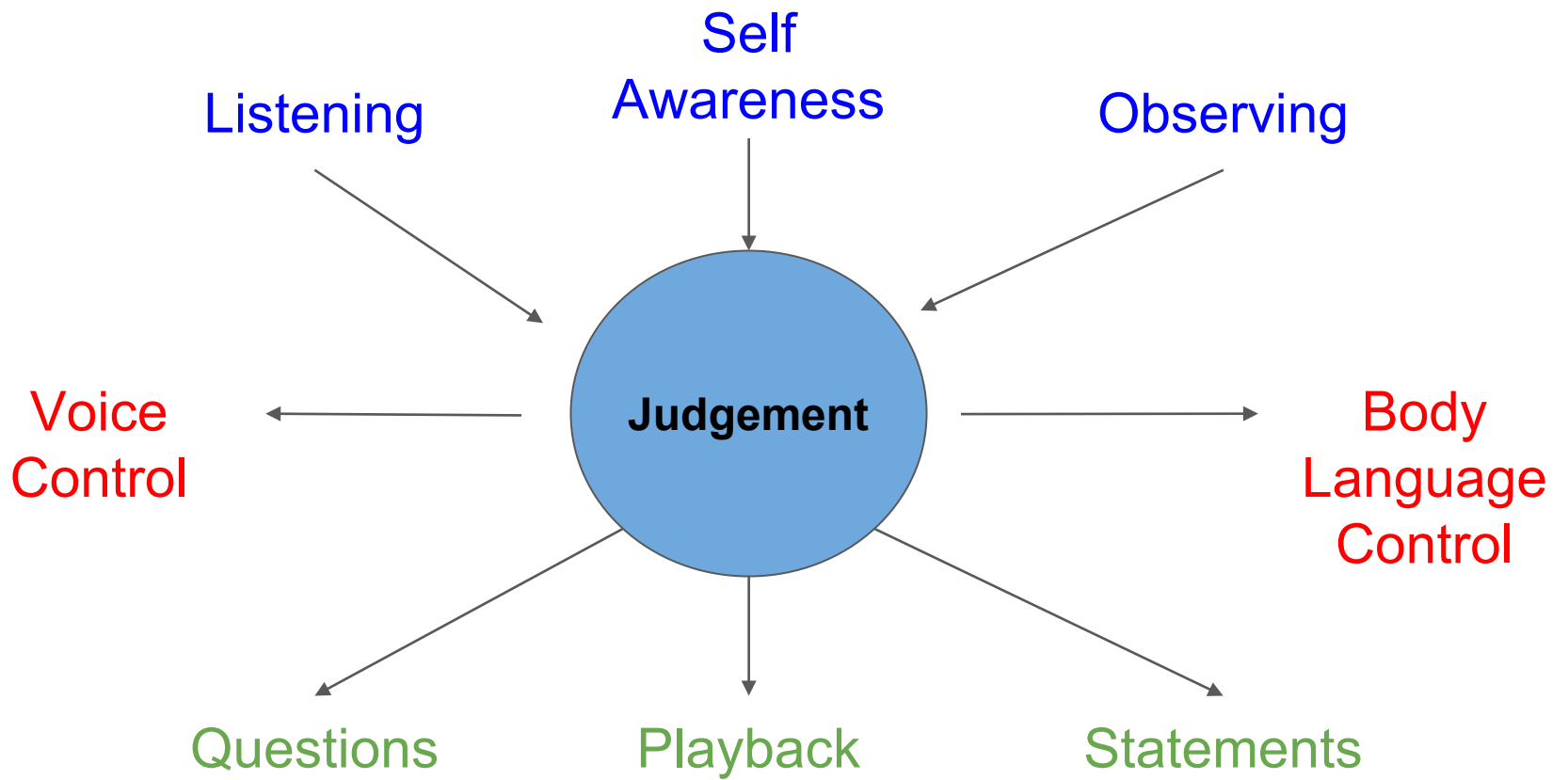
What Matters?



Selling?



Influence



Key reflections and actions...

- How many of your clients are true advocates?
- How effective are you/your firm at each of the 'five pillars'?
- How do you know? If not, why not?!
- What further opportunities might there be for you with existing clients?
- What are the blockers to you/your teams in cross selling?
- How 'in control' are you in your marketing activities?
- How can you improve your conversion when in front of prospects?
- *What one open question will you ask in your next prospect or client meeting?*



Maximising Client Advocacy & Business Development Effectiveness

Jim Thomas
PDW Group (UK) Ltd

jimt@pdwgroup.co.uk | +44 (0) 115 940 4966



ArmstrongWatson®

Accountants, Business & Financial Advisers

A track record of providing solutions to the legal profession

Legal Sector Breakfast Briefing

Questions and Conclusion

Stuart Anderson, Relationship Manager
Clydesdale Bank

ArmstrongWatson®

Accountants, Business & Financial Advisers

Andy Poole, Legal Sector Partner Armstrong Watson

Fairview House, Victoria Place, Carlisle CA1 1HP

T: 01228 690200

F: 01228 690201

M: 07828 857830

Twitter: @AW_AndyPoole

E: andy.poole@armstrongwatson.co.uk

www.armstrongwatson.co.uk/legalsector



ArmstrongWatson[®]
Accountants, Business & Financial Advisers

Disclaimer

This presentation and supporting documentation has been prepared in general terms and therefore cannot be relied upon to cover specific situations; application of the principles set out will depend upon the particular circumstances involved and we recommend that you obtain professional advice before acting or refraining from acting on any of the contents of this presentation and/or supporting documentation. Armstrong Watson would be pleased to advise on how to apply the principles set out here to your specific circumstances. Neither Armstrong Watson nor the presenters accept a duty of care or liability for any loss occasioned to any person acting or refraining from acting as a result of this presentation and supporting documentation.

Working with



The Law Society

ArmstrongWatson[®]
Accountants, Business & Financial Advisers

ArmstrongWatson[®]

Accountants, Business & Financial Advisers

0808 144 5575

www.armstrongwatson.co.uk

ArmstrongWatson[®]

Accountants, Business & Financial Advisers