



# Legal Sector Breakfast Briefing

Wednesday 25 February 2015

Solicitors Non-Technical Skills

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# Legal Sector Breakfast Briefing

## Welcome

Douglas Russell  
Partner  
Armstrong Watson

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# Legal Sector Breakfast Briefing

Wednesday 25 February 2015

- 8.30am - Arrival and breakfast
- 9.00am - Welcome
- 9.05am - Briefing - Solicitors Non-Technical Skills
- 10.00am - Q & A
- 10.30am - 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

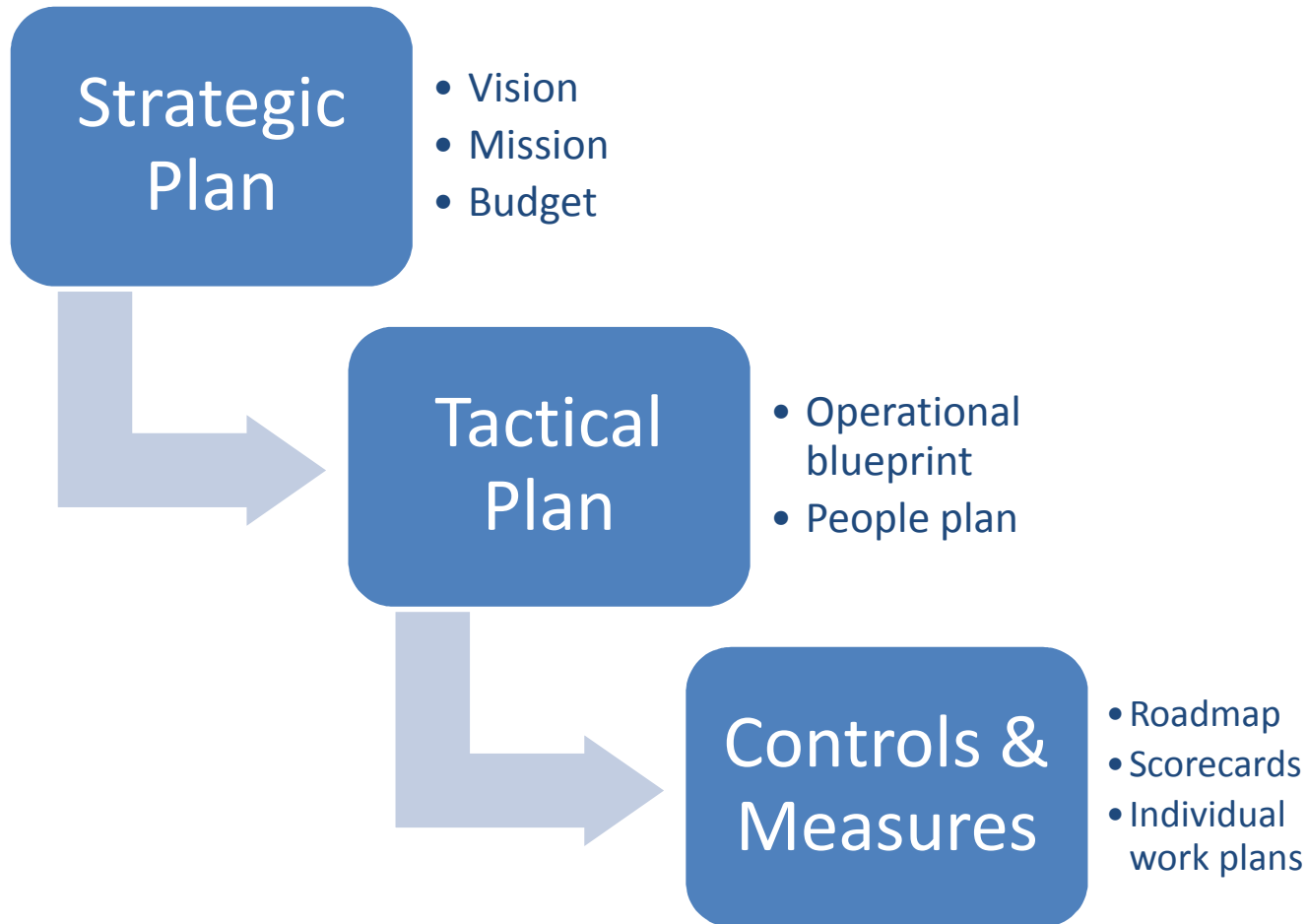
Balanced  
scorecard

'Coffee' plans

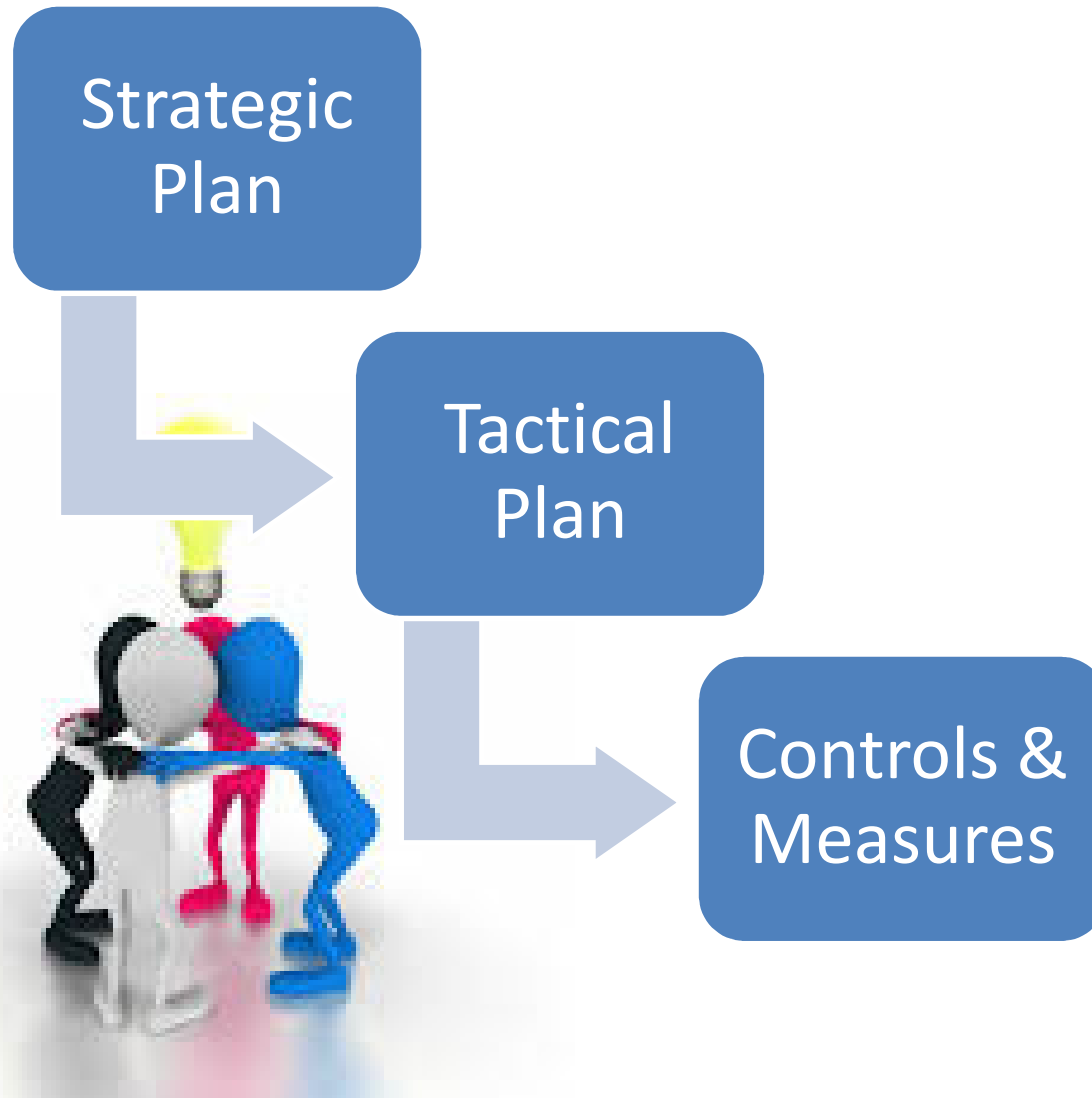


How

# A plan that effects change has 3 key components



# Communicate, communicate, communicate





Objectives

Goals

Strategies

Measures



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Empty rectangular box for content in the Strategies column.

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## 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

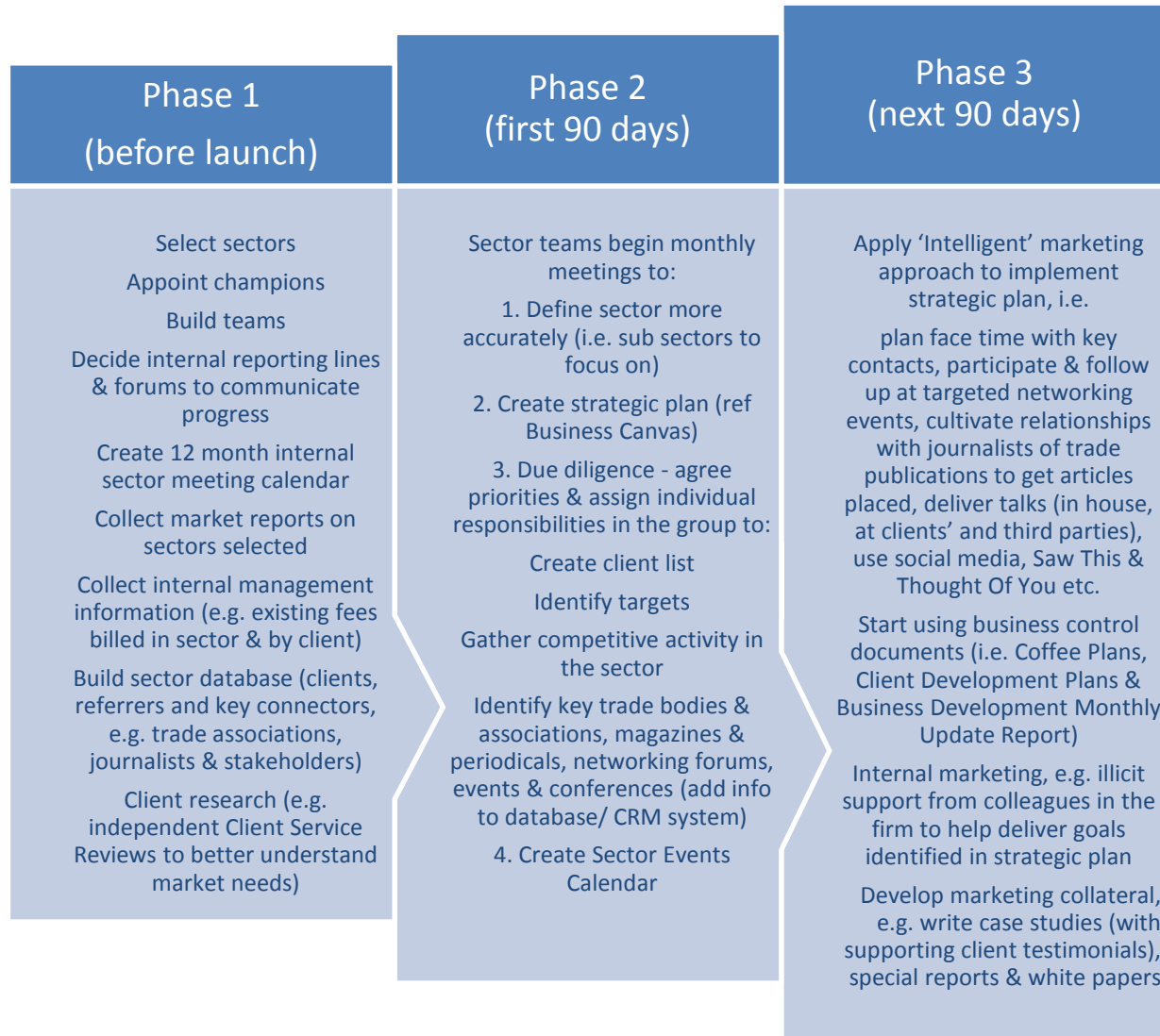
- Monitor Coffee Plan implementation & review monthly
- Track external referrals in Monthly Report & review monthly

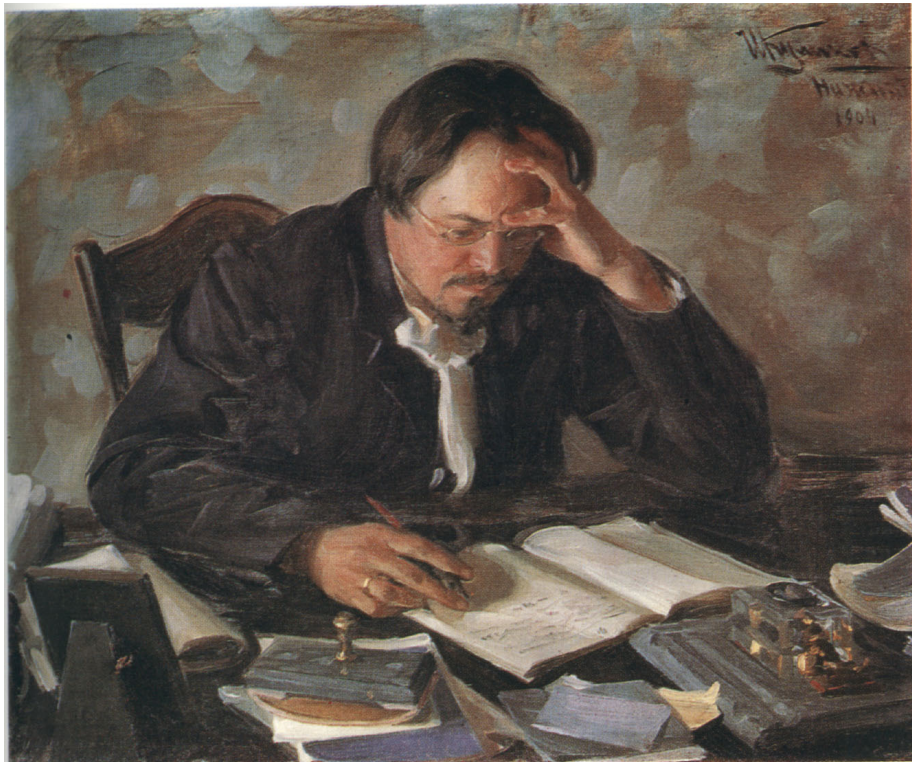
- Get buy in from x & deliver a seminar for members &/or get published in in house publication
- Identify opportunities to build visibility in Police Federation & implement

- 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







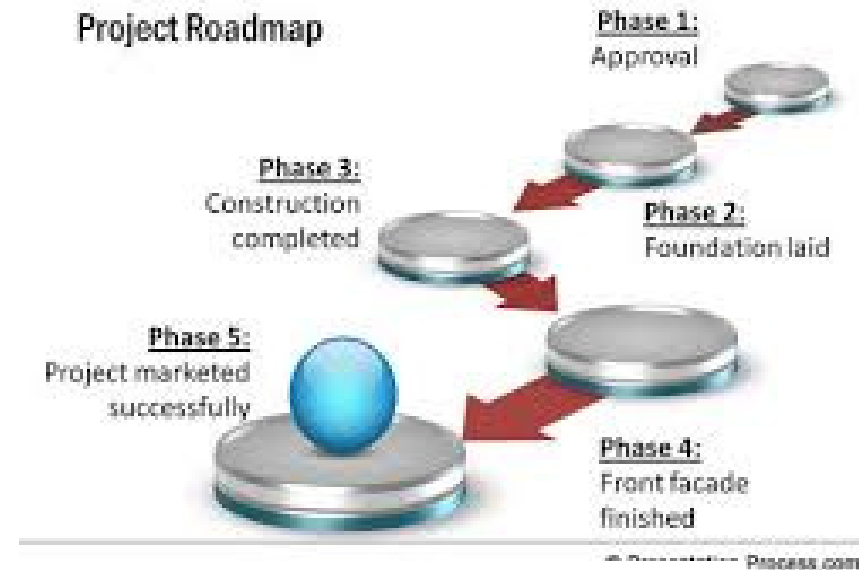
# Creating a Road map

## 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?<br><br>What are your key messages?<br><br><b>How will you communicate this message?</b> | What will you need to deliver budget?<br><br>People<br><br>Budget<br><br>Marketing collateral<br><br>Due diligence (client, desk and market research) | Where will work come from?<br><br>Existing clients (upselling & cross selling)<br><br>On line enquiries?<br><br>Referrals?<br><br>Direct marketing? | How are you going to stay visible to key clients and referrers?<br><br>'Coffee' Plan<br><br>Client Development Plan | Intelligent Marketing tactics<br><br>Events calendar<br><br>Networking<br><br>Social media<br><br>Seminars (in house, client & third party)<br><br>Media plan | Who do you need to influence (Key Business Individuals)?<br><br>Clients<br><br>Referrers<br><br>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  |   |   |   |   |   |   |   |   |   |   |   |   |
| 9  |   |   |   |   |   |   |   |   |   |   |   |   |
| 10 |   |   |   |   |   |   |   |   |   |   |   |   |
| 11 |   |   |   |   |   |   |   |   |   |   |   |   |
| 12 |   |   |   |   |   |   |   |   |   |   |   |   |







WHEN

WHO

WHAT

?

HOW

WHY

WHERE

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## Conclusion

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Head of Business & Private Banking

Clydesdale Bank

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*we're with you...*