

# LEADS TO CLIENTS

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Christina R. Fritsch, JD

Client Success Consultant

CRM and Business Development Technology



- Almost 20 years experience working together with more than 300 top law firms across the country
- Background in Law, CRM & Business Development
- Focus on Client service and CRM Success
- Team of almost 100 consultants and professionals
  - CRM and eMarketing Success Consulting
  - Automated and Outsourced Data Quality
  - Client Intelligence Reports
- Recognized presenter, speaker and author
- Fellow, College of Law Practice Management



# Deb Knupp

## Coach, Trainer & Consultant

### Business Development and Client Experience

- 18 years experience working with over 50% of the AmLaw200
- Background in B2B Sales and Organizational Development
- Focus on Business Development, CX and Innovation
- Holistic advisory services to include:
  - Talent Assessment
  - Coaching
  - Training
  - BD Playbooks
  - Strategic Growth Consulting

GrowthPlay



# Samantha McKenna

Sales Leader, Speaker, Author, Advisor

LinkedIn Ambassador, Demand Generation Expert

- 13 years experience as a B2B sales executive and leader
- Former sales VP at ON24 and LinkedIn (Navigator), former LMA Capital Chapter Board Member for four years
- Deep expertise in SaaS Enterprise technology sales in addition to law firm sales
- Runs #samsales Consulting, including #samsales BDR, which oversees sales and appointment-setting on behalf of clients
- Advises a portfolio of Series A-C SaaS companies on their overall strategy with respect to sales, marketing and operations
- Coaches executives, sales teams and marketing across all company sizes on how to better develop processes, inspire their teams and operationalize in modern ways

#samsales

# Session Objectives



- Understanding Sales Process/Tools – Converting Leads to Closed Business



- Deploying Sales Tactics – Avoiding Common Pitfalls to Rush Rejection



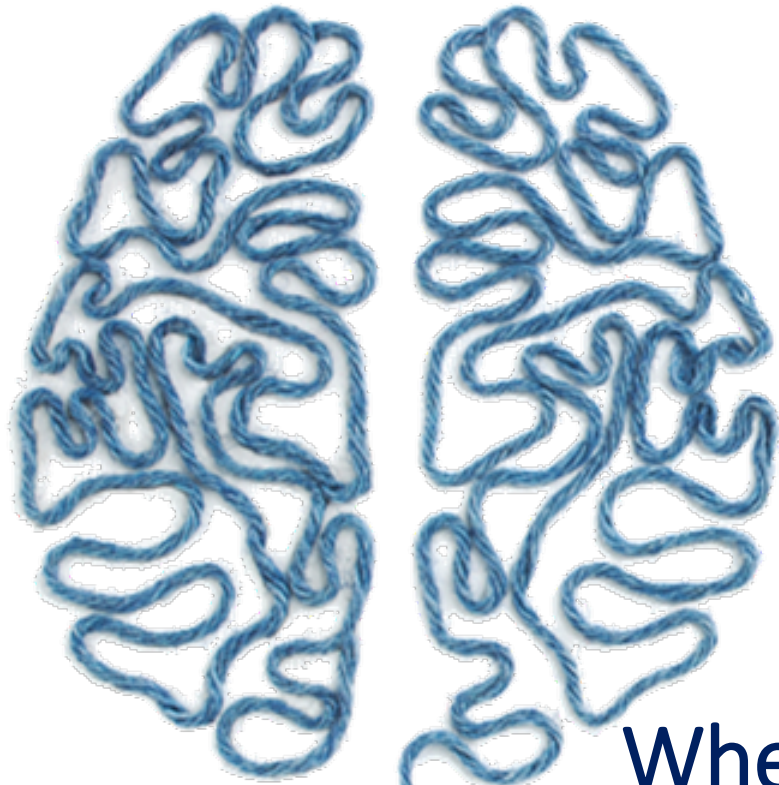
- Leveraging Sales Technology – Streamlining Effort for Predictable Revenue

# CURRENT STATE OF THE MARKETPLACE

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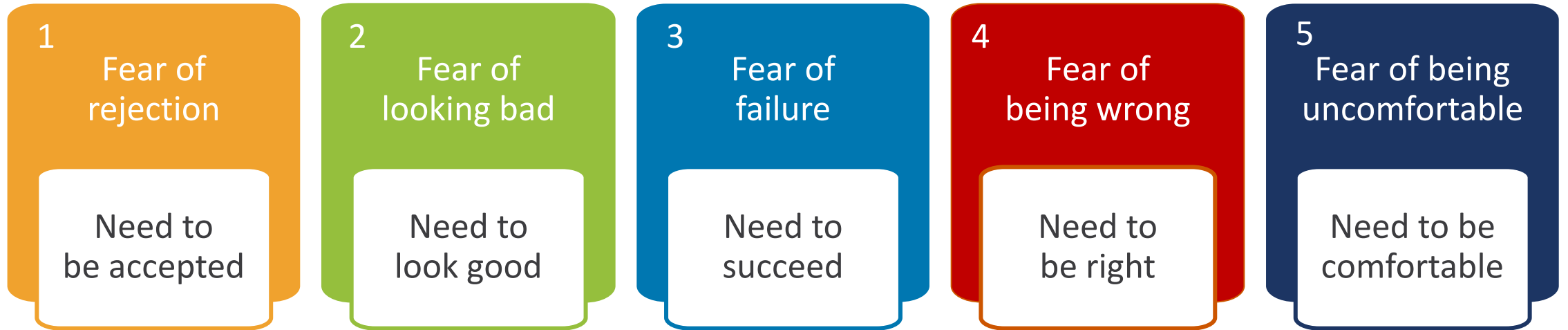
Where Distress Lives



Where Wisdom Lives

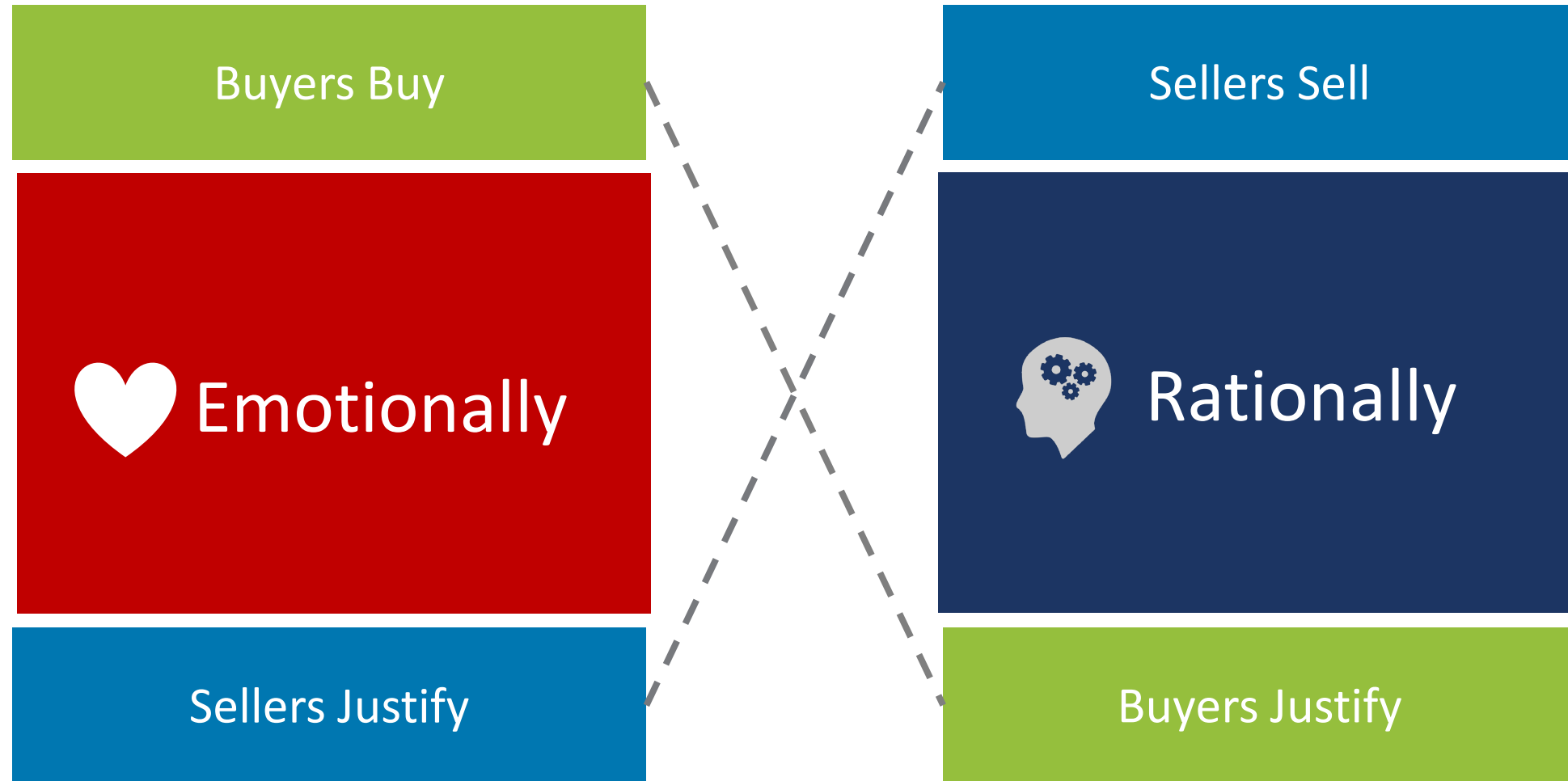


# Human Fear Factors Inform Action (or Inaction)





# The Buyer/Seller Paradox



# Buying Triggers – The 4 Cs



**CONCERN**



**CURIOSITY**



**CONFIDENCE**



**CONNECTION**

# Two GAMES for Engaging

## PLAYING TO WIN

Playing full out

Taking risks

Creating and building

Openness

Abundance

Living into the future

Joy of the game

Going as far as you can



## PLAYING NOT TO LOSE

Playing it safe

CYA

Protecting

Defensiveness

Scarcity

Living from the past

Fear of the game

Holding onto what you have



# DEMYSTIFYING THE SALES PROCESS

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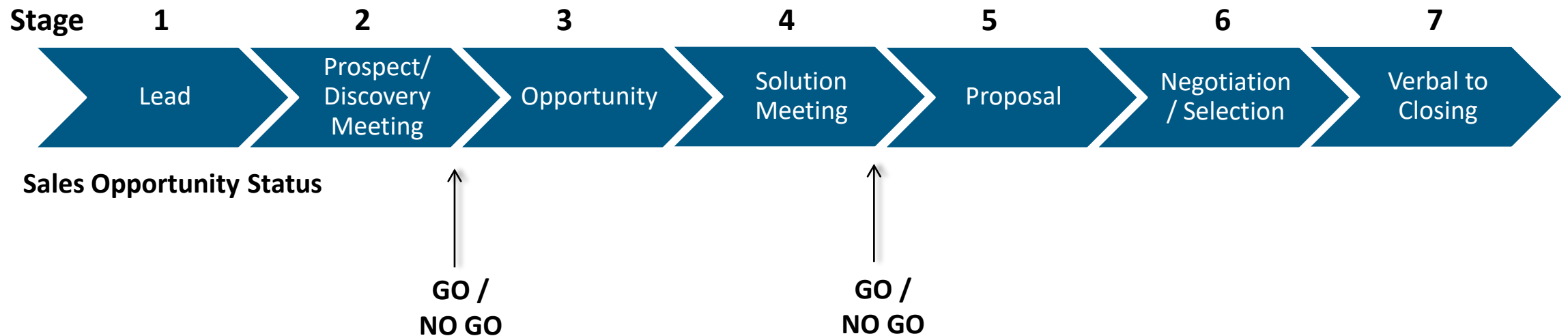
# Speaking the Same Language

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## Sales Terminology Demystified



# Sales Process & Pipeline Stages



# What Is a Lead?

Lead

- Cold
- An unqualified contact
- No conversation has been had with them
- These include
  - Webinar attendees
  - Strangers on your email lists
  - Commenters on blog posts
  - Business cards dropped at a conference booth or speaking event

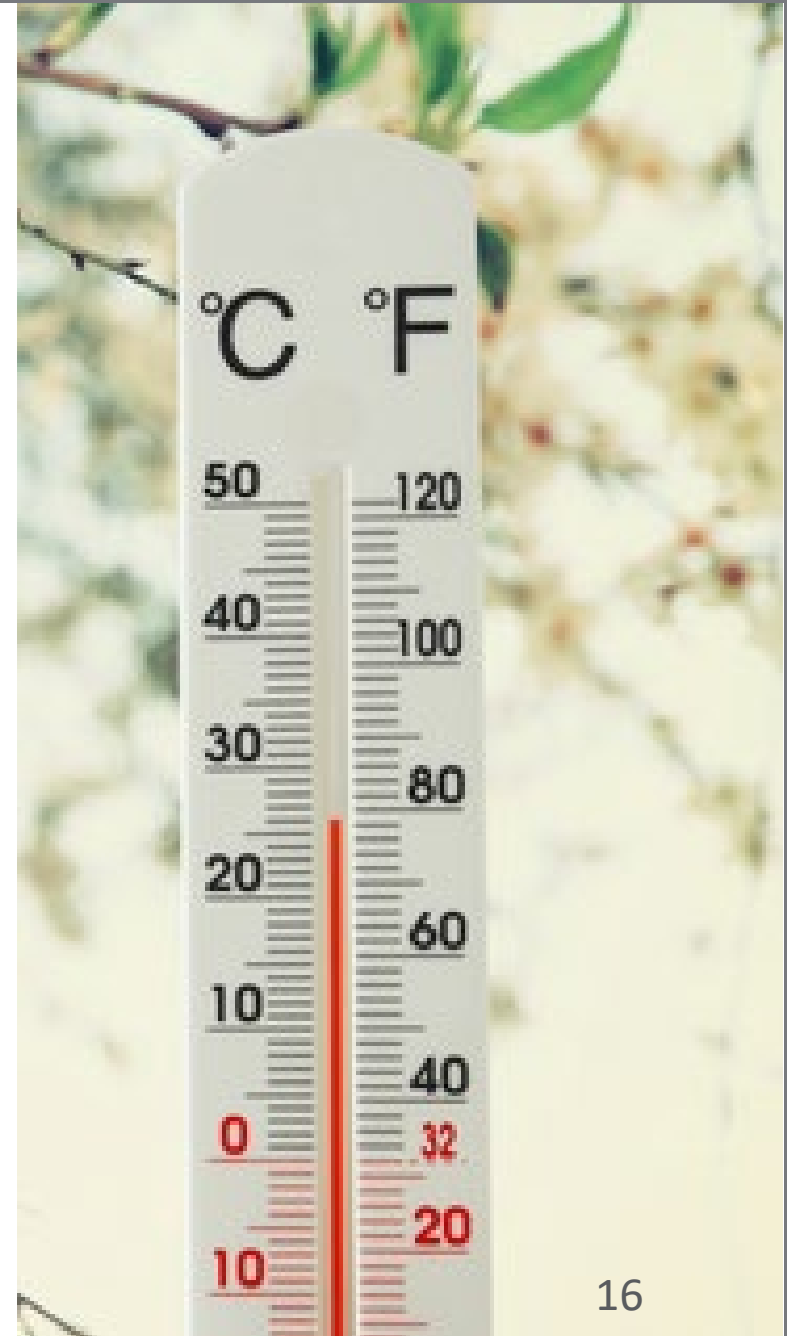




# What Is a Prospect?

Prospect/  
Discovery  
Meeting

- Warm
- A contact who has been moved into the sales process by demonstrating a level of interest
- People who may be researching a solution
- People who have had / want to have a meaningful conversation with you and are a good fit
- These include
  - People who have asked to have a conversation
  - Business cards from attendees of speaking events who ask for follow-up
  - Referrals



# What Is an Opportunity?

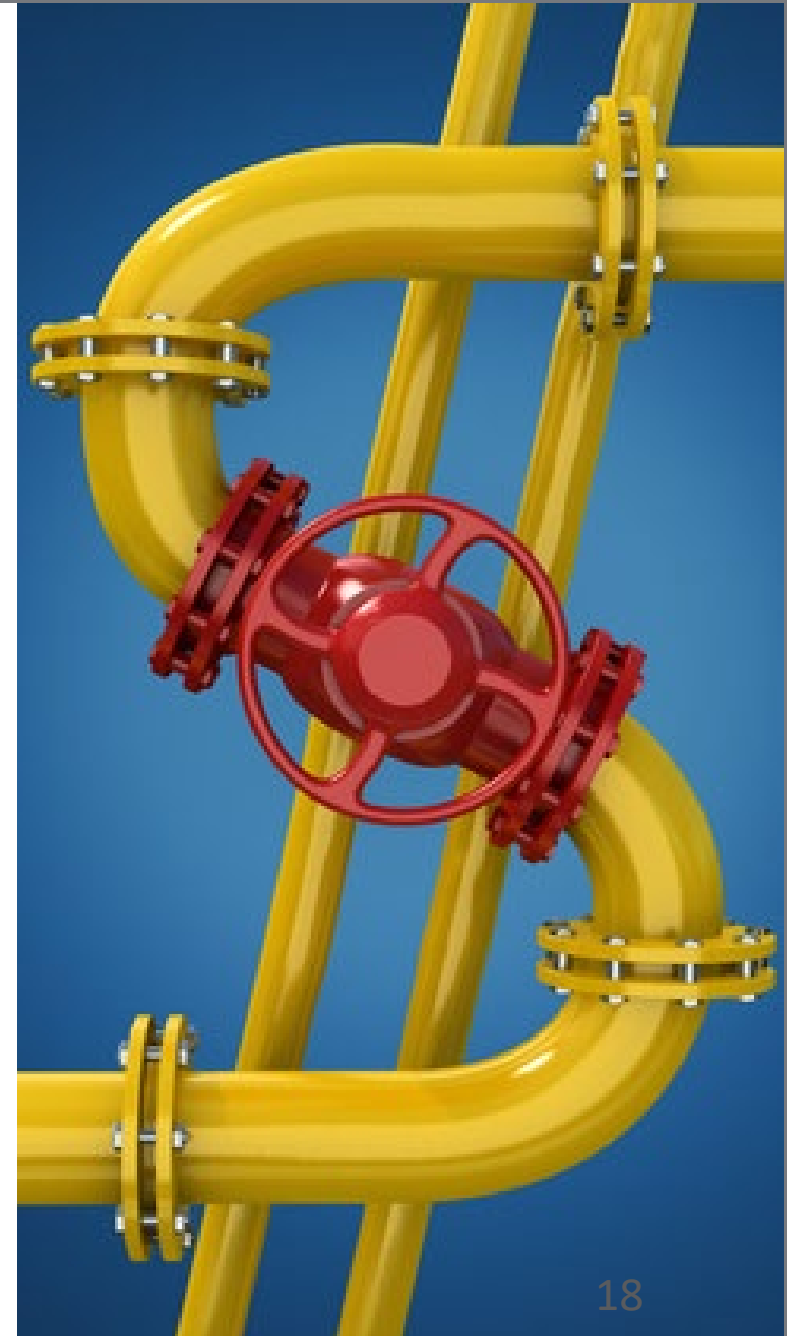
Opportunity

- Hot
- A qualified contact
  - With needs you can fill or problems you can solve
  - Open to considering working with you
- These include
  - Formal or informal pitches or proposals
  - Companies with RFPs you are responding to
  - Clients your attorneys are having cross selling meetings with



# What Is a Pipeline?

- A way of organizing and visualizing the business development process
- A tool – and a process to
  - Track opportunities
  - Gain insights
  - Improve performance
  - Foster accountability
  - Improve follow-up
  - Predict and enhance sales and revenue



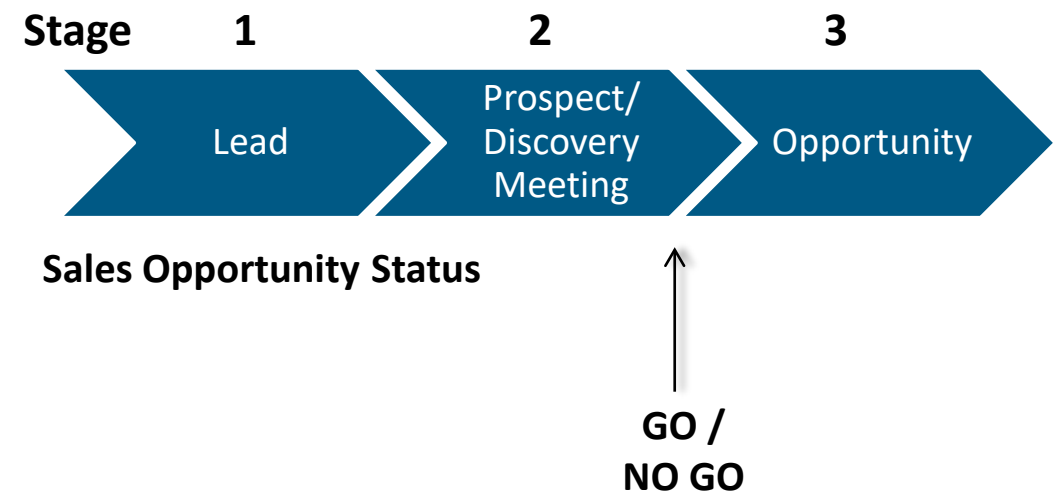
# Why Pipelines?

Because there is an 18% difference in revenue growth between organizations that have a formal sales process and those that don't



# From Lead to Opportunity

- INs with Call to Actions
- TOFU, MOFU, BOFU
- Scoring Leads – Responsiveness
- Mass -> Group -> Individual Interactions
- Scripted Conversations & Key Messaging
- Promoted Offerings/Products
- Definitive Next Steps (DNS) Tracking
- 6 Qualifiers Activation – Problem, Solution, Urgency, Access, Expectations, Budget



# DEPLOYING SALES TACTICS & TOOLS

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# Underlying Drivers of Sustained Revenue

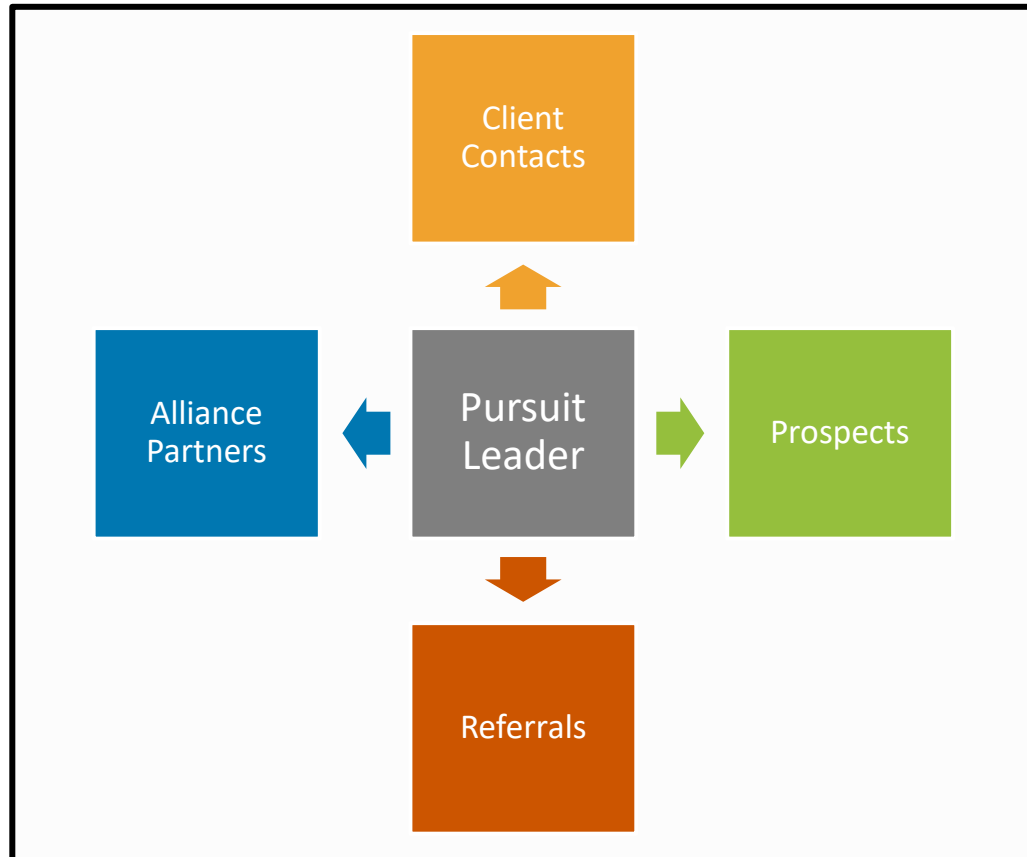
- Prospect with discipline
- Help people as individuals
- Demonstrate humility/collaborate
- Use ears and mouths proportionately by asking discovery questions
- Prepare as a sign of honor
- Stay in touch on purpose and with purpose
- Connect networks
- Predictably close business
- Monitor and measure performance – metrics and key performance indicators



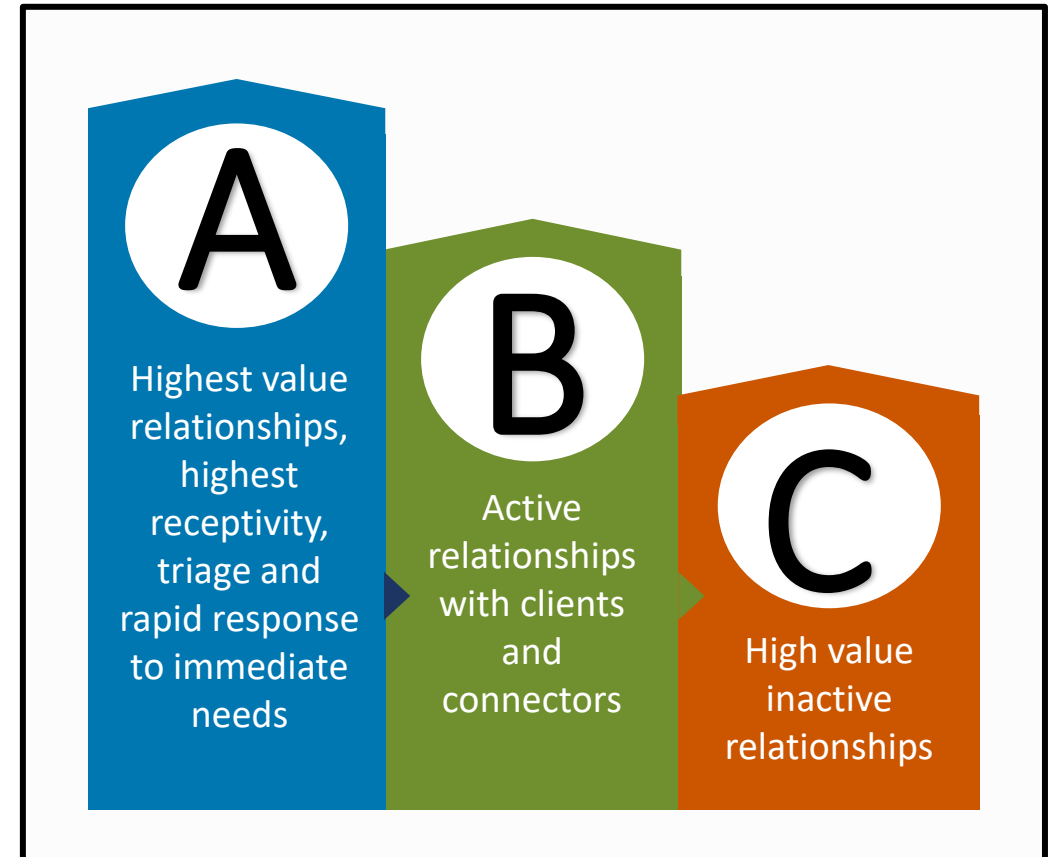


# Key Contacts & ABC Priorities

## Coordinate Efforts for Shared Contacts

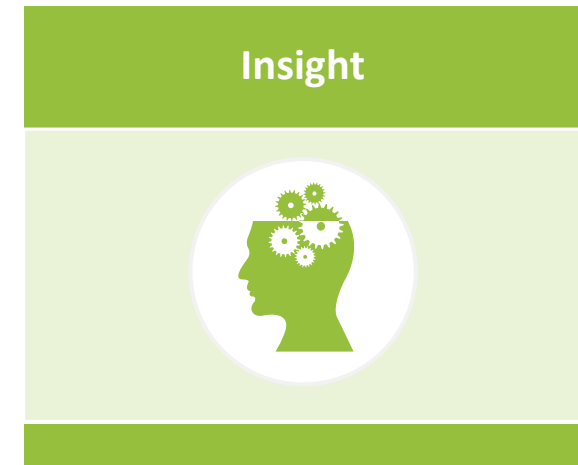
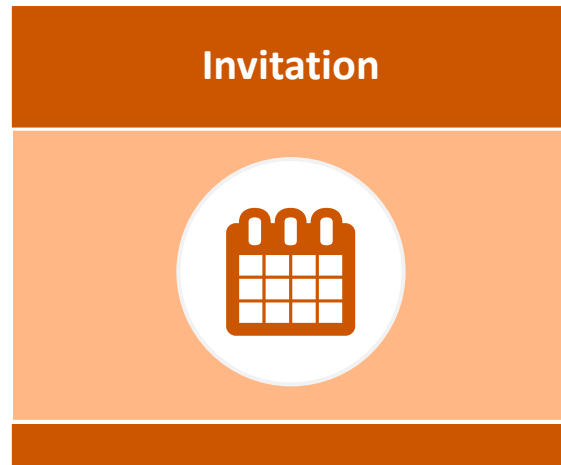


## Prioritize Effort and Time Investment



# Authentic Reasons to Connect

There are **Three INs** that give you an Authentic Reason to connect



# Relationship Building Channels



## Alliances & Collaboration

- Intentional Wisdom Sharing
- Gather Triggers & Targets
- Add INs to the Inventory

## Networking & Groups

- Reimagine Virtual “Events”
- Develop Virtual Community/Cohorts
- Generate Loyalty through Giving Gestures



## Content & Profile Raising

- Curate or produce thought leadership
- Leverage opinion seeking/PR
- Activate media – video, call, email, text, videotext, social, photos, graphics



## Human Connection

# DRIVING RESULTS THROUGH TECHNOLOGY

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# How Technology Can Enable and Enhance Business Development



# Technology to Support Business Development

- CRM
- ERM
- eMarketing / Automation
- Pipelines
- Activity Tracking
- Social Media
- Experience Database
- Proposal Generators
- Webinar Platforms
- Podcasts / Video
- Analytics

# Generating Leads Pre-COVID

- Speaking opportunities
- Writing
- Conferences
- Events
- Adding business cards to email marketing lists





# Generating Leads with Technology

- Website subscription forms
- “Gated” website content
  - Articles / white papers / eBooks / infographics
- Social media
- Blog posts
- SEO / SEM
- LinkedIn / social posts
- LinkedIn / Facebook ads



# Setting Up Pipelines

- Opportunity name
- Opportunity type
- Dates
- Stages
- Tasks
- Activities
  - Can be assigned
  - Next steps
  - Reminders
- Probabilities
- Outcomes
- History
- Custom fields
  - Common set of fields that make sense
  - Too many can be unmanageable



# CRM / ERM

- Contacts
- Relationships
- Targeting
- Activities
- Opportunities



# Activities

- Meetings
- Phone calls
- E-mails
- Meals / drinks
- Sports / entertainment
- Social interactions
- Invited to / attended event
- Sent info
- Provided quote
- Sent proposal
- Pitches / proposals
- RFP response
- Sponsorships

# eMarketing / Marketing Automation

- Campaigns
- Content
- Analytics
- Activities



# Business Development Analytics

- Reports / dashboards
- Help identify the low hanging fruit
- Metrics to consider
  - Pipeline
  - Sales cycle times
  - Progression track of leads
  - Content downloads
  - Pitch / proposal win rates
  - RFPs successes
  - Website traffic
  - Social media campaigns



# SUMMARY & CLOSING THOUGHTS

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# Take-Aways



Virtual working provides a unique opportunity to engage lawyers with business development and technology



Technology-managed qualification can provide proactive triggers for INs for business development activities



Accelerating revenue is the direct outgrowth of disciplined qualification and process management

# Our INs for You



- Pipeline to Success article
- Complimentary consultation on BD pipeline process or tools



- Sample scripts for post-event email communication
- BD Beyond Virtual Insight Briefing
- Complimentary opportunity coaching call



- [The Perfect Discovery \(Initial\) Call](#)
- For the first three individuals that follow up, I'll be review your sales messaging + give you tips/a framework to use, free of charge!

# Connect with Our Speakers

## Scan the QR Codes

to be instantly connected with our speakers on LinkedIn



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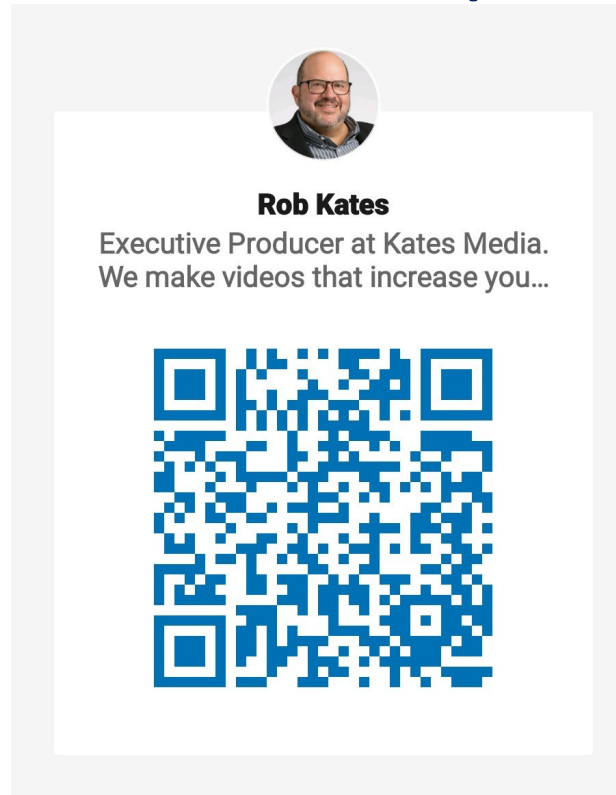
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## Special Thanks to Rob Kates and Kates Media

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