

The value of discovery in the business development cycle

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In previous articles I've discussed the four-step business development process. It's time now to concentrate this entire space on the value of the discovery step because I believe, based on my experience working with lawyers, this is not only the most important step - it's also the one generally given the least amount of focus.

If you agree that marketing and selling legal services is about building relationships, then you won't have trouble seeing why the discovery process is the most important step in the cycle.

In the discovery process, you are going below the surface of identifying general needs. You're actually finding out the most specific needs for each potential and current client. It's not enough to go barging into your marketing department today and ask them to send a promotional package to the lead you just met last night on your return flight from a conference. You're simply wasting your time, your lead's time and that of your marketing people.

A closer look at the discovery process with this prospect you met on the plane

You strike up a conversation with the person sitting next to you on a plane. How much do you actually know about them? Did you go deeper than finding out what they do and where they work? If not, then you haven't gone far enough. Remember, before you can 'pitch' your firm and your services, you need to clearly understand what their needs are - and - they need to be able to articulate them to you.

So, using the discovery process, let's play this example out as it *could* be.

First: Send them a quick email the next day with words to the effect of "Bob, it was nice to meet you on the plane from Toronto last night. When would you be available for lunch? I would like to continue our conversation where we left off." Use this lunch to get to know them a little better including (and don't be afraid to) 'getting personal'. We refer to this as the 'soft discovery' stage. Since you're not taking notes at this lunch, be sure to ask questions that scratch the surface yet give you a better understanding of where they are coming from. The outcome of this lunch should be that they feel you are taking the time to get to know them and their situation; while at the same time you are beginning to see where you might be able to help them.

Second: Within two days of your lunch, send them an email outlining what you heard at lunch. Be very clear that you want them to edit and correct where necessary. Again, all you are trying to do is

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make certain you understand them. And that they know you're trying to.

Third: Once they have confirmed to you that you have heard them correctly; request a more formal meeting. You can use words to the effect of "Bob thanks for taking the time to clarify my thoughts on our lunch. I think there are some ways that I can help, however I still would like to get an even better idea of your circumstances. Can we meet for about an hour either in person or by phone? This meeting would consist of me asking you a number of questions to fully clarify your situation. I would not at any time be offering solutions."

Fourth: Have the 'formal discovery' meeting. You will need to be well prepared with specific questions that allow you to get to the heart of the matter and determine areas of need so that you will be able to offer effective solutions. Caution here; in many cases, your lead will want answers from you right then and there. It is my experience that while you may have one, by continuing to ask them further questions, you will have a much better idea of the big picture. They may have a number of needs and if you jump in and try to solve the first one that comes up, you could be missing out on a lot more work. Find out everything you can about them; their business; their goals; their vision; their challenges; their organization; and most importantly the outcome or outcomes they desire.

Fifth: Follow this up with a discovery letter. It is recommended that this be done within one week of your meeting. Again, what you are doing here is coming to agreement on what it is exactly they need. With this process, you've already begun to serve them because you've helped them to clarify and articulate their need. And, you've begun to build your relationship with them to the next level. You are demonstrating very effectively that you take the time to understand your clients. People love to be understood; and here you are showing them that you understand them.

Once you have confirmed agreement, you are ready to ask them if you can offer some solutions. If you follow this method you will never have to ask for business again.

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