



The Rainmaker Coach

by Mark Powers and Shawn McNalis



Contact Management Software and Client Development

Rapport with referrals sources is built one conversation at a time. Like a string of pearls, each time you meet a prospective or an existing referral source and gather information about them, a new pearl is added to the strand. Once a certain number is reached, the relationship moves from acquaintance to friendship. Becoming friends with your referral sources is both personally and financially rewarding, but requires an investment of time and energy as you learn about them and their lives.

If you've ever fumbled when asking about a referral source's family or couldn't remember their spouse's name, you've experienced the limitations of keeping all of this data in your memory. Add to this the fact that the list of people you know will continue to grow (many law firms have thousands of contacts who have either been clients or referral sources), your memory shrinks. Now you've got a problem. Contact management software can help. It is specifically designed to help you maintain up-to-date information on prospective and present clients and referral sources. Remembering their pertinent details—and being able to access those details—demonstrates you've paid attention and that you care. This is how relationships are built.

Building Your Database

These relationships are critical because they send the referrals that keep your practice alive and thriving. But not all

referral relationships are equal, nor can you afford to spend an equal amount of time cultivating each one. Keep in mind that 80% of your referrals will probably originate with only 20%-30% of your influencer base. We refer to this group as your Top Twenty list. Since this list will change over time, you must focus on cultivating the people on it, and on adding new influencers over time.

Types of Information To Collect

If you don't have a Top Twenty list, collect names from your billing system, case lists or information sheets. The following list identifies the type of information you'll need to collect on clients and influencers in your target market for each of your practice areas.

- Name, title, address (work or home, whichever is more pertinent);
- Telephone numbers (work and home) and fax number;
- Secretary's name (if applicable);
- Status (prospect, influencer, client);
- Last activity or next activity;
- Income range;
- Occupation;
- Marital status;
- Spouse's name; children and/or parents' names/ages;
- Date of birth;
- Hobbies or passions;
- Legal services they desire;
- How they were referred to your office;
- A, B, C, or D rating.

Even if you can successfully remember

key facts about your clients and referral sources when you meet them face-to-face, you can't easily perform many of the additional marketing functions made so simple with contact management software. Once installed the software allows you to perform the following functions with ease, speed and accuracy.

It will permit you to:

- Track your last conversation or any commitments you've made.
- Remind you to communicate with key referral sources and clients on a regular basis.
- Track trends among your various clients, thereby refining your demographic data. This allows you to predict the best opportunities for new clients and influencers.
- Generating reports on all legal services performed and future legal needs identified.

In addition to these basic functions, the software should allow you to perform more highly leveraged functions to cross-sell services to existing clients and influencers.

These functions include the ability to:

- Mail to groups of clients and influencers informing them of future events in your office; inviting them to stop by and update their files; and keep them abreast of current legal issues.
- Mail to target groups of clients in your database who fit the criteria for other firm services, i.e., the real estate client who qualifies for Estate Planning services. These letters can be invitations to attend information sessions or an offer for a complimentary consultation.
- Track the follow-ups to each referral and "tickling" an appropriate response such as a thank-you card or phone call.

Database Features

When it comes to finding contact management software that will guarantee you an organized database, look for a program that has the ability to:

- Create many databases—having a

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generous number of customizable fields will allow you to do this.

- Import data from other formats.
- Merge several databases into one.
- Auto-dial any phone number within the database.
- Date-stamp the notes you take for each contact.
- Store an unlimited number of contacts.
- Have a clear, readable format. The contact information pages are the backbone of the system and will be referred to constantly.

A number of *case management* software systems have the ability to perform contact management functions and can serve a dual purpose. Investigate this possibility if you are in the process of buying new software. If you are interested in just installing contact management software, *ACT!*, *Goldmine* and *Outlook* are the most popular with our clients.

The importance of maintaining an up-to-date database should **not** be underestimated. Most of your new business will be referrals from the people whose names are in this file. Treasure and cultivate this cache of information—your practice depends on it. □

Mark Powers, President of Atticus, Inc. and Shawn McNalis, co-authored "The Making of a Rainmaker: An Ethical Approach to Marketing for Solo and Small Firm Practitioners," and are featured writers for Lawyers, USA and a number of other publications. To learn more about the work that Atticus does with attorneys or the Atticus Rainmakers™ program, please visit www.atticusonline.com or call 352-383-0490 or 888-644-0022.



Lunch "on the Beach"

by Denis deVlaming

My brother Douglas and I took our daughters on a vacation to Vietnam this year. He was a fighter pilot in the '60s and flew two tours over there. He wanted to go back, and he coordinated the trip with a Vietnamese friend who lives locally. He had been a helicopter pilot for South Vietnam during the war. He and my brother became friends and had that experience in common.

The trip was spectacular. The country of Vietnam is breathtakingly beautiful and the people warm and friendly despite our involvement over there forty years ago. Upon our return, Judge Rondolino mentioned to me that "of all the places Judge Beach ever visited," (and that numbers over 100 countries) Hanoi was on the top of the list of places that he wanted to revisit. That prompted me to call him and meet for lunch.

Over a meal of salad and pasta, we talked about our impressions of Vietnam, the countryside and the culture. We agreed that it was indeed a picturesque place to vacation and the people had a way of appreciating life without the "technology" that seems to run our country. Almost everyone was poor over there. Poor but happy and content. There was no "keeping up with the Joneses" because the Joneses didn't have

any more than they did. Happiness and spare time (there was not much of that as everyone works seven days a week in the rice fields in the country or at a job in the cities) revolved around the family. Mom and Dad lived with the kids even if the "kids" were in their 40s. The literacy rate is higher than the United States and the children were polite and respectful. And everyone seemed to love Americans.

When lunch was over, we shook hands and remarked that we enjoyed talking about the experiences in Vietnam that we both shared that reminded us that success is not measured by accumulated wealth but in the contentment that family and friends bring to living. Priceless... □

Denis M. deVlaming practices law in Clearwater.



Where's Denis? See if you can find Douglas, Denis, Lacey and Caroline deVlaming in this photo taken in Nghia An, Vietnam, located about 50 miles NNW of Vinh, one of the largest cities in Vietnam.

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