

# What Makes a Winning Pitch? The Client View

ACRITAS INSIGHT GUIDE

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# What Makes a Winning Pitch?

## THE CLIENT VIEW

### Executive summary

Pitches are an increasingly common way for in-house counsel to select law firms, either for direct hire or to join a panel of preferred providers.

Pitches take up a considerable amount of time and work before the lawyers even stand in front of the client, so failure to impress is a costly and disheartening experience. In-house counsel tell us that many law firms continue to make elementary mistakes in their pitches. Mistakes that are easy to rectify.

This report tells the story straight from those doing the hiring. No less than **650 senior legal buyers** shared details of what impressed them in the pitches they have seen and what frustrating mistakes they had encountered that lawyers should avoid at all costs.

The content of this report has been drawn from [Sharplegal](#) an ongoing annual telephone survey of senior legal buyers in \$50m+ revenue organizations, spanning all industry sectors across the globe. Each year over 2,000 clients are asked about buyer behavior, spend intentions and law firm brand perceptions most critical to informing, supporting and executing a successful law firm strategy.

Quotes included in this report are representative of overall trends in the data.

If you have any questions about this report or would like to discuss Sharplegal data in more detail, please contact your Acritas relationship manager on +44 (0) 808 178 3020 or +1 646 480 5738. We would be delighted to hear from you.

Kind regards



**Lisa Hart Shepherd**  
CEO

# What Makes a Winning Pitch?

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### What makes a good pitch?

422 senior legal buyers said **DO**....

- Understand the client's business, needs, issues, and/or the risks they face
- Show required expertise in the subject matter
- Offer competitive fees/discounts
- Use personal chemistry
- Demonstrate the quality of the individual lawyers
- Be open to alternative fee arrangements
- Make the pitch tailored and relevant.

234 senior legal buyers said **DON'T**....

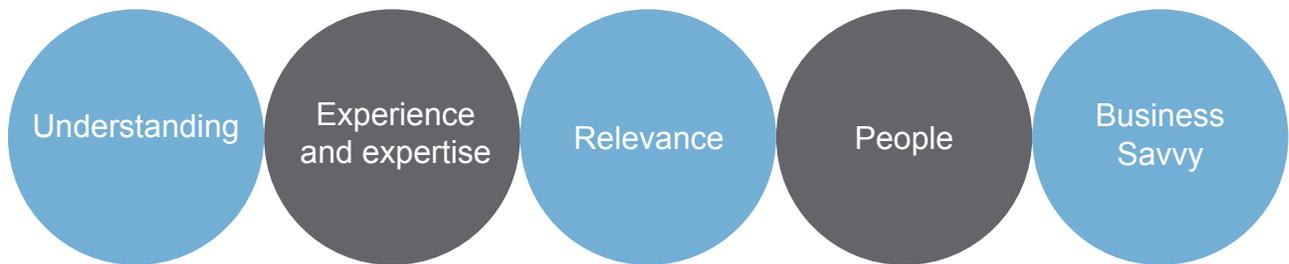
- Deliver a generic pitch
- Forget to do your homework
- Include too much 'marketing' speak
- Exaggerate your expertise, capacity or breadth
- Overlook or fail to demonstrate your understanding of the client's needs
- Include vague fee estimates
- Present a team that is different to the one that would be doing the work.

“The best pitches are when they've taken the time to understand our business and put into context their recommendation in terms of what we actually do, as opposed to some generic presentation of their offices and attorneys... when they learn the specifics of our company and industry and take the time to tailor their pitch to our business.”

US, Construction

## Five top tips for pitch best practice

The positives and negatives highlighted by respondents can be broadly grouped into five areas. By considering each area in turn, you will ensure your pitch will have the highest chance of success.



### Understanding

It seems like an obvious requirement for a successful pitch, but it is still being overlooked. The fact that business understanding is still on our list of most common frustrations demonstrates that law firms are repeatedly falling at this first hurdle.

'Understanding' covers a wide range of internal and external factors, that when considered together and addressed, will help to refine your proposition, and ultimately improve your win rate.

**"The best one by a mile was from a Canadian law firm and they undertook large volumes of work upfront to win the business. They read past/present litigation matters and came up with a litigation strategy. It was an incredibly proactive approach to winning new business rather than reading a few press cuttings. They stated what they would do for you and why their strategy was better; it really stood out"**

UK, Food/Farming/Fisheries

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### ✓ Internal understanding

Understanding whether the opportunity on the table represents a **good fit for the firm** in terms of expertise, client requirements, firm strategy or profitability is often overlooked.

It has been very easy, particularly in recent years, for firms to feel obliged to pitch for every opportunity that comes their way. This however, is not the best approach and may be to blame for some of the more negative comments seen from our respondents.

*"[I get frustrated] when they misread the pitch, if they come in with loads of great lawyers but without a focused understanding of what we're really looking for."*

UK, Energy/Utilities

Firms that complete a comprehensive **pitch/no pitch evaluation** will find that this process also helps in refining their approach to the pitch and identifying the USPs that will set them apart – for all the right reasons.

TOP TIP

### ✓ Client understanding

A solid understanding of the client's needs and what is driving those needs are fundamental building blocks on which the best pitches are built. In many cases, the client will supply a brief or request for proposal (RFP) outlining their requirements for legal support. This is a great starting point for evaluating the opportunity, but should always be explored further wherever possible with the client.

A **scoping call** with the client can help to uncover what the real drivers behind the procurement are. Whilst many RFPs tend to focus on cost reduction (particularly if they have been prepared by an internal procurement team) the needs of the in-house legal team may in fact differ significantly from those stated on the document supplied. Any additional insight gained here can generate **real competitive advantage**.

Having established what the client is really looking for, now is the time to commence thorough research into the client's business, its sectors and the specific individuals involved in the pitching process.

TOP TIP

Ensure that a wide range of research tools are used to gather your information. Complement standard research processes with information from **LinkedIn** profiles, **Twitter** accounts and **people from across the firm**. Finding out ‘who knows who’ can be a great way to uncover some inside information about the culture of the business you are pitching for work from.

“The common complaint has been a lack of understanding of my industry; a lack of familiarization with the sorts of things that I do and therefore the sorts of problems I would actually encounter”  
UK, Manufacturing

Researching the client’s business also demonstrates that you have **invested** time specifically for the purpose of delivering a great pitch, which convinces the client that you genuinely want the work and are willing to go the extra mile.

“The best one by a mile was from a Canadian law firm and they undertook large volumes of work upfront to win the business. They read past/present litigation matters and came up with a litigation strategy. It was an incredibly proactive approach to winning new business rather than reading a few press cuttings. They stated what they would do for you and why their strategy was better; it really stood out”  
UK, Food/Farming/Fisheries

However, understanding the business is often more about **listening**, than trying to recount your knowledge back to the client. Clients are frustrated by lawyers who presume to know more about the business than they do, especially when their ‘knowledge’ is based on sketchy research.

“They treat me like a moron. They think that I’m a dummy and they talk down to me and they think [they] know my business better than I do.”

Australia, Business services

“Perhaps attempting to demonstrate knowledge about business when that knowledge is slightly unsound or misguided; they think they understand our business but they don’t necessarily understand it as well as they think they do.”

UK, Energy/Utilities

“When they make as if they know everything, also about the industry of the client. They pretend to have a solution for everything and know it all, yet one knows exactly, when the problem arises, they first need to familiarize themselves [with the matter]. That makes me very skeptical.”

Germany, Manufacturing

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### Experience and expertise

Of course, it is not enough to say that you are focused on doing a great job for the client, you also need to demonstrate that you have the ability to deliver.

#### TOP TIP

Clients don't want to be told how good the firm is, they want to be shown – through clear examples of **relevant** expertise and experience.

There are a number of ways in which this can be done, for example:

- ▶ **Ask intelligent, relevant questions** – offer thoughtful, knowledgeable solutions to the problems in question
- ▶ **Apply your skills and expertise directly to the client's situation** – demonstrate that you are capable and confident enough to filter out irrelevant information and focus on the important aspects of the task at hand
- ▶ **Talk about similar matters to demonstrate prior experience** – as with expertise, the key is to stick to relevant examples.

“Not a general pitch but a very specific pitch with very specific expertise [...] they look at what we're looking for and they get experiences close to what we're looking for and they present that instead of trying to pitch the whole firm.”

US, Retail/Wholesale

“Obviously it is that they are clearly in a selling mode and so it is often the case that there is not a great connection between what they have to sell and what our needs are. So it's perhaps not fully understanding in advance what our needs are.”

US, Healthcare

“The simplicity, the examples they provided. Nothing too theoretical like others, they provided examples and it was all quite simple.”

Spain, Retail/Wholesale

## Relevance

Tailoring a pitch includes understanding the client's business as well as ensuring the brief has been read in depth and fully understood. Making sure the pitch is focused around these unique factors is critical to ensuring the client hears the right messages.

A good rule of thumb, whether in a written submission or a live pitch, is to stick to the **80/20 rule**. 80% of the content should be focused on the client and their needs and just 20% about you and your firm. In a live pitch situation, this can be particularly effective. The client will most likely have sat through several other presentations and will be eager to speak.

Ask as many questions as possible during the session – this will allow you to get the best possible understanding of their issues, and to demonstrate that you really do listen to your clients.

~~“They are too generic. So, it's not good enough to give me a general pitch. If we do a pitch, it's for a specific piece of work and I expect you to come prepared to speak about that specific piece of work.”~~  
South Africa, Energy/Utilities

Clients will know if you have not done your homework. Failing to translate that homework into a tailored pitch is a waste of the resources spent collating it.

Keep your presentation focused on possible solutions to the client's current problems, whilst showcasing relevant expertise. Less is certainly more, particularly when 'more' means dull, irrelevant or overly sales-driven content.



TOP TIP

### ✓ Avoid self-promotion

We already know that clients want pitches tailored to their own business and legal/strategic issues. Your potential client most likely already knows what each law firm can do; that's why they have been invited to pitch.

~~“They don't listen to the instructions and so what they are pitching us is this standard, 'Here's our glossy brochure and just give us a try because you will be so impressed by our services that you will want to use us'.”~~  
Canada, Banking

It stands to reason, then, that clients are **frustrated** when presented with generic marketing messages about how good the firm is. Particularly when the content is the same as that included on your website.

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### ✓ Be honest. Always.

There is a fine line between selling the skills and benefits of the law firm and over-promising what can be delivered. Being **realistic** about the firm's strengths and weaknesses can instil confidence in the client.

Many clients have experienced something bordering on dishonesty from law firms: not just overly ambitious selling, but a misleading representation of what the firm can do.

*"They over-promise their capabilities and experience."*

Singapore, Food/Farming/Fisheries

Another practice that leaves a bad taste in clients' mouths is having work completed by a different team to the one that is promised at the pitch.

*"It's 'bait and switch', where they will tell you about all the wonderful things they do and then the person that you want to do that work doesn't have the time to do that work and you end up with someone else. That's probably the biggest frustration. Not really being able to understand what their capabilities are in that pitch process."*

US, Manufacturing

### ✓ Stand out

How far should law firms go to ensure they stand out? The word '**innovative**' appeared on our list of positive pitch factors, but didn't make it into the top ten. Nevertheless, many clients talked about the need to demonstrate the law firm's USP as well as how it will deliver to the client's requirements – something that not all firms do successfully.

Innovation in this context doesn't necessarily mean something unusual or experimental, but can be extended to include flexibility and creativity in the approach to the pitch.

Given that every client's organization is unique, it is possible to stand out from the crowd simply by following the tips contained throughout this report and impressing the client by giving them what they want and need.

*"They did something different, so not turning up with PowerPoint – they got us on our feet and made us think, slightly different."*

UK, Financial services

## People

Knowing what the client wants and needs will allow you to send the right team to the pitch – lawyers who have the appropriate expertise and experience and who will be able to engage with the client about their business interests.

As with many of the tips in this report, there is reciprocity between carrying out the research about the client and demonstrating that you have done it. In other words, understanding the client's needs allows you to send the right people, thereby presenting a better pitch. Alongside this, sending the right people demonstrates to the client that you have bothered to research their needs and that you have the required expertise.

Don't underestimate the effect of **matching** your pitch team to the in-house legal team in terms of age, gender and levels of experience. Clients like to see themselves in the teams they choose to work with. If possible send people who would actually be involved in that client's day-to-day work.

"I was very frustrated recently: we invited three firms to come in and chat with us about a piece of litigation and we were speaking to the law firm about it and the response was, 'Oh, well, you know, probably so and so should have come because he would probably be the person who would be working on this for you.' From my perspective if I take the time to invite you in, then you ought to be bringing the person who is most likely to be performing the work."

US, Hospitality/Leisure

### ✓ Use chemistry

Using chemistry also relates to putting the right team in front of the client, but extends beyond just considering who the client needs to meet. Chemistry is something that can't be faked and there is no way to ensure that a client and lawyer will click. However, having the opportunity to meet the lawyer who will be doing the work allows the client to decide if they will get on well.

Chemistry may be subjective, but here are some simple observations from clients that should help to create a better experience:

- ▶ Make the client feel like you really want to work with them
- ▶ Show the client you have already invested in them by delivering a relevant, interesting pitch from the team that will be doing the work
- ▶ Demonstrate that you are after a long-term relationship, not a one-off appointment
- ▶ Don't be afraid to use a little humour, clients are people too!
- ▶ At all costs avoid death by PowerPoint, the client will thank you for it.

TOP TIP

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### Business savvy

Clients want solutions to their problems – that’s why they have requested a pitch.

Lawyers need to convince the client that they are focused on saving the client money, guiding them through potentially damaging litigation, helping them break into a new market, or whatever it is that the client needs.

“We’re a company and we have to make money, if the partner understands the business and comes across in a way that he is more practical, and more business oriented, more focused on just getting things done, that’s good. I don’t need to talk to somebody that has written an article. The guys who are bottom line focused, that’s what we need.”

US, Manufacturing

#### TOP TIP

Not surprisingly, the ability to present **solutions** to problems is heavily tied in with understanding the client’s business and the problems it faces currently, or might face in the future. In short, look at the pitch not from the perspective of your firm but from the perspective of the client.

“They knew us so well, it was almost like someone in-house giving the pitch. There’s nothing about us they don’t know, and no question we could ask that they wouldn’t be able to answer.”

US, Technology, media and telecoms

#### ✓ Be prepared to talk about pricing options

Overall costs and the willingness of the firm to discuss alternative fee arrangements feature fairly high on the list of good pitching points that clients remember. Although fees and AFAs are not necessarily something that the pitch team can influence in general, some of the most positive comments come from clients who have been offered clear pricing options based on their requirements at that particular time.

Be **open** about pricing, provide accurate estimates, agree assumptions and discuss the client’s attitude to risk. Demonstrate your experience of working on similar projects by using previous knowledge to **inform** your pricing strategy.

“Inability to meet my desire for creativity on cost. They sell me on service and quality but they can’t sell me cost, or are unwilling to.”  
US, Manufacturing

## Conclusion

Whether or not the work is ultimately won, a good pitch may open up doors to future opportunities or favourable recommendations.

The key to a successful pitch is preparation; you already know what your firm is capable of, so pitch preparation is all about understanding how that can best be applied to the specific needs of the individual client.

In short, a successful pitch should leave the client feeling confident that their own problems will be solved, rather than feeling educated about irrelevant aspects of the law firm's service.

Aim to ensure that the client is left with the following impressions:

- ▶ The firm listened, knows and cares about my business
- ▶ The lawyers really know what they're doing in the areas for which I need them
- ▶ The team is focused on solving my specific problems
- ▶ I could easily work with the people I have met
- ▶ I am confident that costs are suitable and based on their understanding of my needs.

### Best Practice for Pitching: Checklist

- 1. Do a pitch/no pitch analysis
- 2. Scope the work with the client
- 3. Do your research
- 4. Identify relevant examples of experience
- 5. Build your pitch team (include people who will do the work)
- 6. Keep the presentation short and focused
- 7. Remember the 80/20 rule
- 8. Create chemistry
- 9. Be business savvy
- 10. Win or lose – do a debrief with the client, in person if possible