

BD or not to BD

Is coaching the answer?

Actuaries don't market the services of insurance companies and software developers rarely put their coders in front of clients. Yet, even as professional services firms become better at harnessing the expertise of marketers, the sector is increasingly training fee-earners to sell. What is going on, and should the professionals leave it to the professionals? **James Lumley** finds out more.

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by James Lumley
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“**L**ike many of my colleagues and peers, my role is to not directly sell,” says Amit Champaneri, Head of Clients and Sales at Deloitte in London. “Directly influencing a sale from a pure sales or BD role does happen, but it is still a very rare thing to do.”

Champaneri is a professional services sales leader and has worked for law and accountancy firms that are large, small and gargantuan.

“We are here to enable sales,” he says. “We are here to understand what the client’s journey is and build a solution to meet their needs based on challenges they are facing.”

That takes time, planning and hard work. It involves navigating complicated organisations, identifying clients and client needs, leveraging propositions, highlighting opportunities, initiating conversations and much more besides. But after all that, and with much support, fee earners are the ones who go toe-to-toe with the client and make or miss the sale.

So yes, as far as he is concerned, fee earners really do need to be trained to sell. Unlike insurance policies and sausages, the professional services product is created, delivered and sold by its fee earners.

Sell, sell, sell?

Lee Curtis, who describes himself as a “no-nonsense law firm veteran” was, until last year, Global Head of Sales at Simmons & Simmons. Now he has his own sales and growth consultancy. He has trained hundreds of lawyers on “how to sell” as he knowingly and provocatively puts it.

“Lawyers are very, very skilled in some areas and also very, very unskilled in others,” he says. “And they are often like eggs, with a hard outer shell, but actually quite fragile. They don’t like rejection.”

This, he says, does not make for a natural salesperson. “In sales, especially volume sales, you get rejected on a daily basis. Lawyers can take it personally.” They need help

not to, and, he says, as intelligent and motivated people, they respond well to logical explanation.

“There really is a formula to sales,” he says, “and you can teach it.” For example, partners are often reluctant to chase up a client because they “don’t want to be a bother”. That is one of the best ways to miss a sale, says Curtis.

“One of the fundamental psychologies of a lawyer is that they would rather not chase up a potential sale or opportunity and let it go cold than chase and be told ‘no’. But I can guarantee that 98% of the time, a sale isn’t lost because of the person who submitted the proposal. It is lost on price or scope, or letting it go cold.”

He can prove it. And he does.

Marketing or BD?

Curtis is clearly focused on sales. But what about marketing and BD?

“In professional services firms there is often a misunderstanding about what the difference is between marketing and business development,” says Claire Rason, founder of coaching firm Client Talk.

“Marketing is creating a brand for your firm, and that really is best left to the professionals. Business development, on the other hand, is about creating relationships. They might be relationships with clients, potential clients, or stakeholders. It is important that fee earners understand this.”

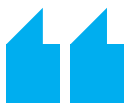
Julia Robinson, head of training for law firm Ropes & Gray in Europe and Asia, agrees.

“There are many specific training offerings for fee earners that will improve their BD skills, such as presentation skills or thought leadership writing courses, but pure BD skills development is about relationships and demonstrating value,” she says.

“All BD coaching is about developing and enhancing work-winning competencies,” says Lisa-Marie Sikand, former CMO at Norton Rose Fulbright. What that specifically is might differ



“What got you here won’t get you there.”



Mentors share advice... coaches help people develop their own relationship style.

from person to person but “developing self-awareness and understanding our own - and others - emotions are key levers to business development success”.

An important point is that, while relationship building should be second nature to anyone who has chosen a career in sales, marketing or communications, young solicitors and accountants often neglect their peer networks in the first few years of their careers because they are so busy learning how to become technical experts.

“What can sometimes happen is that you have someone who has worked incredibly hard for the first six or seven years of their career to become a technically brilliant professional, but in the process they have neglected their network. So, even if you are a junior associate focused on technical legal work, it is still a good idea to make time for networking as the people they meet now will be the decision makers of the future,” Robinson says.

“It is hard,” she adds. “There is a lot to think about.”

Relationships matter

It is hard, but it is also vital, according to Trang Chu, former investment banker, Founder of Affective Advisors, a coaching firm for senior executives, and an Associate Fellow at the Said Business School in Oxford.

“The ability to get information nowadays is so quick and readily available,” she says. “And many of the products and services that banks and professional services firms are offering,

while not commoditised, aren’t so niche that five or six competitors aren’t providing something similar of the same high quality.”

“So where do you differentiate yourself? Now, it isn’t just the IQ impact that you need, it’s also emotional acuity, being aware of your emotional state so that you have more agency over your choices and behaviours.”

Or, as Lee Curtis puts it: “In the coming years, with the advancement of Generative AI they are going to need their personal skills more and more as a way to differentiate themselves in an already saturated market.”

‘What got you here won’t get you there’

David Sheldon is a former partner at Fried Frank, a former general counsel EMEA at Crédit Agricole Corporate & Investment Bank and now an executive coach working with professional services firms with a interest in building great client relationships.

He is clear that, for many reasons, coaching and training professional services fee earners in business development can be a delicate task which can easily backfire without a nuanced approach. In some respects, you are taking highly skilled professionals out of their comfort zone – that requires some care.

He cites American leadership coach Marshall Goldsmith’s dictum: “What got you here won’t get you there.”

“This really resonates with me in a lot of the training work I do, particularly with lawyers,” he says, “because the way we are educated at university, trained as lawyers and then in the formative years of our careers it is all about subject matter expertise (as it should be). That is what validates us. We think that is what clients want, and only want. But in the last 20 years, that has changed. There is a whole host of other attributes that we

need to enable and enhance impactful client relationships.”

And, he points out, when partnership beckons, young professionals are required to transition away from pure technical work into management and relationship building. “From the doing to the growing,” he says.

This requires a major change in mindset because the success-through-technical-excellence strategy may well have been something that they have used since primary school and has served them well to date. It is often deeply ingrained in their psyches.

Training, coaching or mentoring?

At Deloitte, where the annual intake of fee-earners is vast even in comparison to many large law firms, training, coaching and mentoring are regularly used tools, says Champaneri. From training new recruits on what is expected of them, to management skills, there is a strong investment in regular training sessions. “Influencing skills” is becoming more essential, he says, and there is more direct sales training than we have seen before.

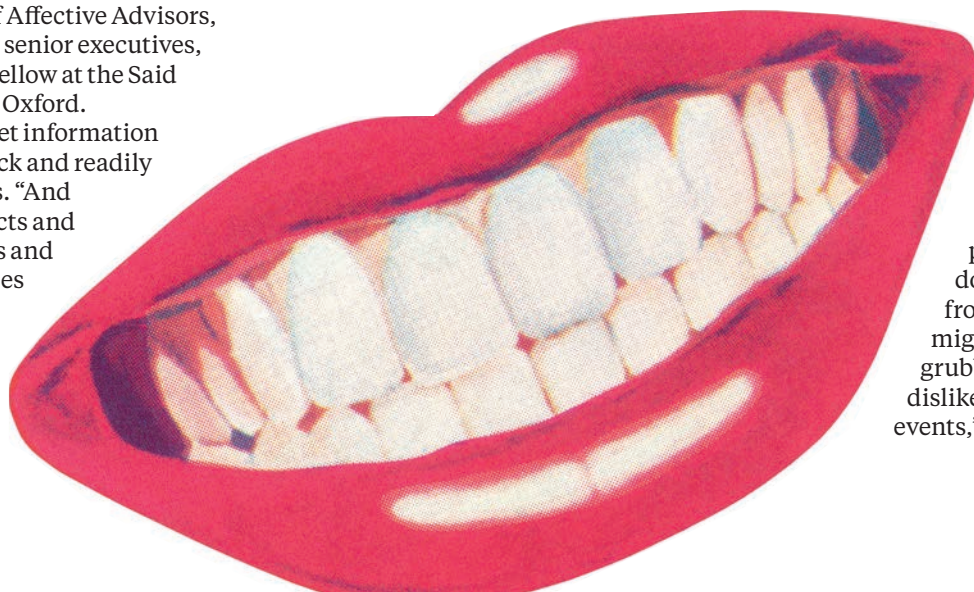
Ropes & Gray’s Robinson agrees that high-quality training in specific communication skills, such as presentation, is important but some core BD skills are often best learned through coaching and mentoring, with an emphasis on coaching.

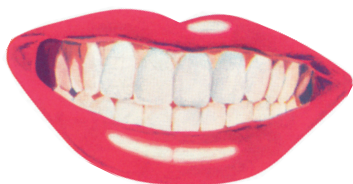
“Mentors share personal experience and advice, whereas coaches help people develop their own communication and relationship style that is the best fit for them and their clients.”

Does that mean only one-to-one coaching sessions? Not entirely, says Sheldon. One-to-one work clearly has a place but so does group work. He finds it very effective to leverage the

experience of senior leaders in his group coaching sessions.

“The preconception that some professionals have is that potential clients don’t want to hear from them. They might feel a little grubby selling and dislike networking events,” he says.





“The fact is, many of us feel that at different stages of our careers. In group sessions, being joined by senior leaders who have shared their own experiences, successes and challenges can be very powerful.”

The power comes from senior people showing a degree of openness and even vulnerability. Which is a key to this type of upskilling, says Sheldon.

“There needs to be a zone of psychological safety for these group sessions to be really impactful,” he says.

He also notes, one size does not fit all. “Some people, for example, are going to be comfortable speaking on panels, others are more effective in a small group setting, some prefer a one-to-one context.”

Different people will need to develop different skill sets to find their own authentic way to develop and keep great client relationships.

Not for everybody?

What about those people who really don't want to sell? Is there room for them in today's professional services firms?

Yes, to a certain extent, says Sheldon. “I don't want to diminish the fundamental importance of technical excellence,” he says. “Technical excellence is what got you there – but often it will not be enough.”

Champaneri agrees. “You can't have everybody speaking to clients and selling,” he says. “Someone has to focus on the delivery of work. You see that in smaller firms when you have to decide who goes out there and wins business, and who gets vital work completed.”

“Some people would rather have a career in which they just focus on client delivery, and that's completely fine. It enables fee generation while adding value,” he says.

“Not everybody wants to be in a sales-focused role, but everyone plays a vital role in enhancing key client relationships to support enabling further sales.” ■

Changing behaviours

BD training isn't about taking technical experts and turning them into a salesforce. At its best, it is about behaviour change and personal growth, writes **James Lumley**.

Lee Curtis' frequent use of the taboo word 'sales' is deliberately designed to force fee earners to accept that smart thinking is just thought until it is marketed and monetised.

He doesn't expect the people he trains to become full-on salespeople. The goal is for them to become effective parts of the sales process, working within the apparatus of the firm to drive growth and win and retain clients.

Having shot one of the elephants in the room, he then starts to help fee earners develop the key behaviours of good salespeople “confidence, perseverance and resilience”.

This is because what all BD coaches are really doing is helping people become more emotionally literate. “What we are talking about is people skills and human skills,” says Claire Rason.

Trang Chu is both a coach and an affective scientist, researching emotions and emotion regulation. She points out that telling people to be more emotionally aware doesn't really address the central issue, and isn't going to stop them from focusing on their expertise, which is where they are most comfortable.

“If people have a difficult time understanding what their emotions are, and aren't emotionally literate themselves, how can they make sense of something like that? I am getting people to master their emotions in order to be better leaders.”

One of the techniques she teaches is “reappraising”. That is identifying an emotion that appears to be holding someone back, understanding it and making it constructive. For example, one person she was working with

felt great anxiety before pitches. Chu helped that person reappraise their emotions by recognising that the emotion was really a mixture of excitement and a desire to do well.

“Understanding situations can be a very effective way to help people deal with clients, particularly if you are talking about sales,” she says.

“Often professionals don't do it because they are fearful, and worried, and aren't able to see their situation in a different way. So, my goal is to make people more emotionally agile so they can say ‘OK, I might feel that way, but I can choose to feel another way’”.

Focus on expertise classically causes professionals anxiety in client meetings when a conversation strays into a territory outside of the fee-earner's expertise.

“They could react by thinking ‘I need to go back and find out all about this person's business’, or through reappraising, they could reframe and think ‘we are here to share knowledge’, which is more constructive and achievable.”

It is situations like these, says Curtis, where key opportunities can be missed. Stepping out of one's own expertise and recommending someone else, or saying to the client “I don't know, but I will find you someone at the firm who does,” will be difficult for some.

But a reframing of emotions could enable a successful cross-sale. Which is one of the most important sales objectives of all professional services firms. ■

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