

# What have we learned about business development since March 2020?

What did we think would happen to BD after March 2020?

And what have we actually learned between then and now?



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# What have we learned about business development since March 2020?

When we were told to work at home back in March 2020 people were understandably blindsided. Unfamiliarity and uncertainty temporarily put pay to all but the most essential tasks and anything more peripheral was placed on hold while we set up home offices, plugged in our laptops and tried to get something close to sturdy Wi-Fi connection.

Business development was one of the things that was put to one side.

However, just as quickly, it became very clear that if our practices were going to have a future, BD couldn't be shelved for long and we started to adapt using the tools available – the phone, the ability to write content and social media – to replace more traditional face-to-face activities.

This got us so far but as it became apparent how long the restrictions could last, our virtual marketing approach has become much more sophisticated. So sophisticated in fact that it is now recognised that many of the improvements we've been forced to make are now mainstays in our personal BD plans.

In this special report we'd like to share some of these improvements.

We trust this will both help you acknowledge the hard yards you've put in to keep your BD going and reassure you that you're doing all the right things.

If we also give you some new ideas you can use to win new work and help your professional service firm grow, all the better.

We also want to stress this report is only part 1 of 'What have we learned about business development since March 2020?'

Part 2 is a free, one hour 'ask the experts' session that Bernard and Doug will run to give you and your colleagues an opportunity to ask questions and us an opportunity to share the best practice we've picked up over the last few months.

**If you would like to book your session, please email [bernard@tenandahalf.co.uk](mailto:bernard@tenandahalf.co.uk) today.**



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# 1. Client development

## What did we think in March 2020?

“I’ll keep a distance as clients will be too busy with their own lives”

“As long as they know I’m here for them, that’ll be enough”

## What have we learned since then?

If we have learned one thing over the last few months, it is we are all in this together.

We all need support, we all need a sounding board, we all need an (occasional) agony aunt!

From experience we have seen and heard that clients have most definitely valued time with their advisers and those who have invested in their relationships have already seen the benefits.

That said, the initial feeling that clients are too busy for their lawyers and accountants has subsided to be replaced by more structured and more informed client development plans.

And again, those investing in creating and implementing those plans are already seeing the benefits.

Following on from the previous point we now know that many clients have had a rocky time of it and so, have really valued their advisers taking a more active stance in contacting them, talking to them and even reassuring them.

There has also been a widespread realisation that this has been an unsettling time for everyone.

This means simply fading into the background until you’re contacted could be all the persuasion clients need to look elsewhere for the support they want.

What we know now is even though it’s moved online or on to video or phone calls, regular client contact remains essential.

# 1. Client development

## What did we think in March 2020?

“If we keep a distance and provide some content and a few invitations to online events, that’ll be enough”

“I am a lawyer/accountant, there is very little I can tell them about their business that they don’t already know”

“Let’s set up a ‘we’re with you’ style email, at least clients will know we’re thinking about them”

## What have we learned since then?

There is too much content out there and people are fed up with Zoom and webinars.

This is a time for the personal touch.

If you’re going to run online events as part of your client development plans, tailor them.

If you’re going to send them content, either:

- Make sure it is practical, relevant, valuable and easily digestible
- Stick to the odd ‘saw this and thought of you’

You still know as much about your markets, geography and sectors as you always have (more in fact if you have really bought into client development and are having more conversations with your clients).

An integral part of client development is being able to share insight, news and gossip alongside your own perspective. Again, this is something we now know we can continue to share ... albeit via the phone, email and social media rather than in person.

Mercifully, this disappeared VERY early on! Maybe it was because we all received so many in our personal inboxes, maybe it’s because common sense prevailed.

Whatever the reasons we now know that this type of insincere, untargeted and anodyne marketing does nothing but irritate the recipient!

## 2. Networking

### What did we think in March 2020?

“We can easily replicate face-to-face networking events online using Zoom “

“It’ll be easy to get people to attend virtual events as they won’t have anywhere else to network”

### What have we learned since then?

The popularity of Zoom events quickly waned and the format has become tired, especially as it’s difficult to build rapport in such a clunky and unnatural way.

Then when you add in the enormous number of webinars that emerged post-lockdown in March 2020, it quickly became obvious a drastic rethink was needed. If virtual networking was going to work, we needed to come up with more attractive alternatives and make better use of the new (and better) platforms that started to appear.

For example, if you were hosting a large event (say more than 20 people) Remo would be a much more effective option because you can:

- Chat to small groups on virtual tables
- Move into 1on1 conversations in private space
- Combine networking with attending a relevant presentation
- Easily move around the virtual room so you speak to everyone you want to (which to be honest is rarely, if ever, the case at a traditional event!)

All of us have now experienced ‘Zoom fatigue’. If you want an audience, you’re going to have to be more creative in coming up with ideas for events. Your event will have to stand out from the norm so people think that is worth another hour of screen time after sitting on their PC all day.

For example, virtual cookery classes, wine tasting and escape rooms are some of the events we’ve seen work well for clients.

Or, if you don’t want that level of structure why not invite small groups of people with shared interests to join you to chat about the sport you follow or the musical genre you all like.

Arguably, it’s now *easier* to develop our relationships with the new contacts we’re meeting at virtual events and our existing clients and contacts.

## 2. Networking

### What did we think in March 2020?

“While we can run events, we can’t follow up properly if we’re working from home”

“We can run virtual networking events, but more personal networking will have to stop”

### What have we learned since then?

It is arguably now easier to develop 1on1 relationships whether that’s with the new contacts we’re meeting at virtual events or our existing clients and contacts. People are generally more accessible as they not travelling or sitting in internal meetings (and they’re less likely to be blocked by an overly officious gatekeeper!).

Zoom and Teams have removed many of the barriers that existed before. They let us into our contact’s homes and as a result, people appear more human and open.

The pandemic and how it’s affected us, our friends, our relatives and the practicalities of working from home and the restrictions impacting on our non-working lives also gives us something in common. We can use this for small talk and, as we know, it’s the small talk that creates a personal connection.

This is where Zoom (and the other video conferencing platforms) do come into their own and can become part of your networking strategy.

If you want to carry on building your network on a more individual basis we’d suggest this simple 3-step approach:

1. Make a list of the existing and lapsed clients, referrers and other professional contacts you want to focus on and find a credible/relevant reason to get in touch with them to get the ball rolling
2. Turn this list into your ‘Coffee Plan’ and diarise when during the year you will make contact by inviting each contact to a Zoom or Teams meeting or a telephone call (and calls relating to an open file don’t count!)
3. Send your invite incorporating both your chosen reason for getting in touch and 2 suggested dates/times

And don’t forget you may need to send a reminder if you don’t get an immediate response. Don’t be embarrassed or think that this is too salesy. A gentle reminder almost always works.

# 3. Presenting

## What did we think in March 2020?

“We can take our old seminars online and present them in the same way as we always have”

## What have we learned since then?

When you're delivering any content – training, a pitch or a legal update – there are a whole host of new things you'll need to consider if you're going to present virtually with the required impact.

The one thing you can't do is simply dust down the slides you used for a seminar and present them the same way via video.

However, just as it is when you present in person, your ability to influence your audience will hinge on your ability to engage your audience. The tricky bit is that your ability to build the required rapport and connection immediately diminishes when you're online.

This means you'll have to adapt your approach. Here are a few tips that will help you successfully make the switch:

- Share your materials in advance to make it easier for people to prepare, ask questions and interact on the day.
- As people are less comfortable speaking up on video and as it's your job as a presenter to coax, cajole and encourage them to speak up, you need to start your dialogue with your audience before the event.
- Concentrate on facilitating a conversation not delivering a lecture.
- People have more limited attention spans and more distractions when logged in virtually so focusing on engagement is even more crucial.
- Be mindful of time and try to stick to a maximum of 60 minutes (or break longer sessions up with natural break and/or practical exercises).
- Learn your tech. Where do you need to angle the camera? Can you record your session so you have video to market more sessions?

# 3. Presenting

## What did we think in March 2020?

“Webinar is only available format”

“We’ll have to host our own online events”

## What have we learned since then?

Webinars are one option but as there are so many alternatives you should consider like virtual roundtables, downloadable videos, podcasts and informal ‘ask the expert’ sessions.

When you’re planning your events calendar, it is always a good idea to mix things up and present your audience with a variety of options. It will maximise the chances of you delivering something that appeals to everyone.

Collaboration has become one of the rising watchwords in professional services marketing since March 2020.

Your referrers and contacts need to stay visible too and, like you, are trying to find more interesting and innovative ways to grab their audience’s attention.

Why not ask your contacts if you can participate in their webinars, videos, round tables, podcasts and panels? It’ll get you in front of their audience and, better still, they’ll be responsible for all the organising!



# 4. Content

## What did we think in March 2020?

“Everything needs to be COVID-related”

“A mix of long-form content and short-form content is still the way to go”

“Written content (i.e. blogs and articles) is enough”

## What have we learned since then?

Producing nothing other than COVID-related content will not attract your audience's attention. There is simply too much of it.

Instead look at 2 options:

### 1. Creating a positive spin

Don't tell people what to worry about, tell them what to do in order to start putting everything in place for a successful future. The content will be similar but it's the way you say it.

### 2. Maintain a practical approach

Tell people what to do next (you can make pretty accurate assumptions as to what different types of clients need to do based upon your most recent client experience) and set everything out in clear, straightforward, sequential steps.

The world is awash with new content so the time people have to filter let alone read new pieces has been severely limited.

You now need to concentrate on producing bite-sized chunks and, wherever possible, get those across using bullet points.

Following on from the previous point people don't have time to read everything so make it easy.

Use video (whether that's 'talking heads' or animated infographics) or audio (sound files and podcasts) so people can take what they need in instantly consumable formats.

# 4. Content

## What did we think in March 2020?

“Focus on self-published content for simplicity and cost-efficiency”

“Stay on point – people just want technical advice”

“Get everyone involved – they’ll have time while we’re working from home”

## What have we learned since then?

People are more likely to take the time to read editorial in the newspapers, magazines and websites they choose to read (unless you get your headlines absolutely bang on and there are ways to do that).

This is a time to push for those editorial slots. Not only will it give your messaging added credibility it will also give you access to a brand new audience and give you brand new marketing materials you can use to reconnect with your clients, contacts and targets.

As there is an avalanche of content coming out of all of your competitors’ marketing machines it is sometimes better to concentrate on reporting what’s happening more generally in your sector or local area.

And again, if you can give that positive spin or concentrate the good news that will make your content more appealing. The other benefit of ‘reportage’ style pieces is it will chime with current search phrases which again will help you get in front of a new audience.

Just because fee earners are working from a new location doesn’t mean they’ll immediately generate new skills.

Your writers are still your writers, your networkers are still your networkers and your client developers are still your client developers.

In fact, given the volume of available content, it is arguably more important to make sure your new content is being produced by the best qualified authors (even if that means outsourcing some).

# 5. SEO

## What did we think in March 2020?

“Just keep doing what we’re doing”

## What have we learned since then?

While things are in a state of flux it's easy to understand certain activities need to be prioritised.

Conversely, it's easy to see why other areas have been neglected.

SEO has been one of these. After all, it's worked so far so surely it'll keep working?

Unfortunately not!

There are two reasons addressing/refreshing/improving your SEO has to be moved up the priority list:

1. Given the current restrictions very few people are seeing let alone working closely with colleagues.

This means the internet is almost always our first port of call when we need an answer.

As a result, your ability to generate new enquiries is now inextricably linked to you being one of the first answers searchers find.

2. The huge spike in internet usage since March means your website is now arguably your most potent promotional tool.

This means you simply cannot afford not to invest in making sure your site is found by the people searching online for your advice, insight and answers.

# 5. SEO

## What did we think in March 2020?

“Everything needs to be COVID-related”

“We’ll stick to what we’re good at/known for”

## What have we learned since then?

Given the enormous effect the pandemic has had on all our lives it was no surprise when most firms immediately responded by posting and optimising endless blogs exploring the ways COVID would impact on our personal and working lives.

The only trouble is from an SEO point of view the more people that post exactly the same headlines and key words, the harder it is for your pieces to get found.

What we have learned is, it’s much better to either:

- Go niche and explore the elements of each
- Stick to answering the questions your clients are asking you

In the (very recent) past lawyers and accountants have stuck to technical subjects directly related to their professional disciplines, e.g. legal updates or regulatory changes.

It’s open to debate as to whether this has ever been the right approach (!) but since March it’s become increasingly apparent that clients want (and respond to and engage with) more practical advice.

Over the last few months, the posts that have worked best take a current issue or concern and provide a clear step-by-step solution for the reader that contains all the key words and phrases people are using during their searches.

And, if you can put these into short bullet points, this plays even better in the search engines.

# 5. SEO

## What did we think in March 2020?

“We can come up with our own ideas”

## What have we learned since then?

Again, this is a very traditional approach. “Fee earner X, it’s your turn on the blog rota so what are you going to write about?”

Given there is both a much higher number of searches being performed every day and a higher volume of new content being posted by lawyers and accountants, you now need to be more sophisticated when it comes to choosing your topics.

However, the good news is everything you need is already sitting in Google.

If you search on a current issue related to your practice or to a piece of work you have recently completed for a client, turn the phrase into a question. Google will immediately show you the 4 or 5 most frequently asked questions on that topic.

Use any (or, better, all) of these questions as headlines and you will immediately get the search engines on to your side.

# What can you do to make your firm's approach to business development more effective?

This report is designed to get you thinking about how far we've all come since March 2020. We trust it'll also reassure you you're doing the right things and maybe even provide you with some ideas you can use to win more new work.

However, it's only part 1.

Part 2 is a free, one hour 'ask the experts' session that Bernard and Doug will run to give you and your colleagues an opportunity to ask questions and us an opportunity to share the best practice we've picked up over the last few months.

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