

BIZDEV <http://www.cba.org/practicelink/bizdev>

## Law I.Q.

More firms are using competitive intelligence to grow their business.



Competitive intelligence (CI), generally defined as gathering and analyzing information about customers and competitors for short- and long-term planning, is helping a growing number of firms determine a client's needs in detail and to gather feedback on their own business development efforts. And it's catching on in Canada.

Although some U.S. firms even use it when recruiting talent and acquiring other firms, CI in the Canadian profession usually falls under the purview of marketing departments. For example, Ogilvy Renault LLP now has three professionals dedicated to full-time intelligence-gathering.

The firm hired two MBAs to act as "intelligence

advisors," researching and analyzing data on emerging industries and prospective clients and their market environments.

"They prepare client dossiers, so if we have lawyers going out to do a pitch or if we've been asked to do a presentation, this group will prepare a background document on the client," says Lise Monette, who oversees the group launched three years ago. "[The document] has all the vitals on the company, their competitors in the market, and information about the law firms that represent them, so we can determine their needs in detail. It's very analytical."

Toronto-based legal business development consultant Heather Suttie, who advises firms on how to make the best use of CI, suggests they start by "mining" their client lists to ascertain top clients, then break down the lists according to each client's Standard Industry Classification (SIC) code.

"The smart firms are investing in their clients, by taking the time to find out who are the ones keeping the lights on," she says.

Wanda Woollett, marketing manager of the Calgary office of McMillan LLP, is already aiming to expand her firm's CI program, which she launched five years ago. "People may have a sense of what their law firm does, but when you can lay financial numbers on top of that, it becomes much more significant," she says.

Still, using CI to build business remains a novel concept for many law firms. Zena Applebaum, who oversees a formal CI program at Bennett Jones LLP in Toronto, says it's only in the past year that she has seen an increase in the number of Canadian law firm marketing professionals at Society of Competitive Intelligence Professionals functions. "It's new, so everybody's at a different place on the curve."...

By **Daryl-Lynn Carlson**. Read the entire article online at [www.cba.org/practicelink/bizdev](http://www.cba.org/practicelink/bizdev).

STEPHEN MACEACHERN



## The client comes first

*Why one law firm created the role of chief client officer.*

When a recession hits, stay close to your client. Fraser Milner Casgrain LLP has followed that advice by becoming the first Canadian law firm to appoint a chief client officer.

Bernard Bougie, who spent 31 years with Samson Bélair/Deloitte & Touche LLP in Quebec as a management advisor before entering semi-retirement, took on the role in March. His key role in the evolution of Deloitte's client-centric focus — emphasizing team-building, coaching and

business development for clients — will underline his primary focus at Fraser Milner: guiding and coaching FMC's partners within their designated client, industry and geographic groups.

"The objective for me is to identify the full potential of the resources that are available, move forward in building client relationships, and help the partners become better business advisors," Bougie says. "It's great to talk about this, but execution is key."

The chief client officer reports directly to

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the CEO and is part of the firm's senior management.

"Bernard participates in managing partner meetings, has the respect of the managing partners, and contributes to the compensation process, so the partners know that their behaviour, as far as Bernard's mission is concerned, will be taken into consideration as far as compensation [is concerned]," says FMC Chair and CEO Michel Brunet.

Since starting with the firm, the Montreal-based Bougie has travelled extensively across the country. "My office is in Canada," he jokes. "Technology is fun, but if you want to get things moving, it's got to be done face-to-face." The timing of the firm's enhanced client focus is fortuitous, he adds. "It wasn't a result of the recession, but

instead, the recession makes their choice audacious and gutsy."

In fact, there is no better time than now to ramp up client-service programs, says Michael Rynowecer, president of BTI Consulting Group Inc., a client-service consultancy based in Wellesley, MA. "Not only can firms reach out to clients to see what they want and get an idea of the changes they're going through, their voice is standing out more," he says.

"Clients are getting a clear message that these law firms are the most committed to understanding their needs and clearly that's the strategy needed to bring in revenue on a short-term basis."...

By **Daryl-Lynn Carlson**. Read the entire article online at [www.cba.org/practicelink/bizdev](http://www.cba.org/practicelink/bizdev).

## Supporting the rainmakers

For several reasons, too many law firms provide little or no business development support or assistance to their top rainmakers. Often, these lawyers do not want or feel the need for any help in developing new business. However, that's not always the case.

Rainmakers constitute only about 5 to 7 percent of the equity partners in any single firm. Either they know exactly what type of support can help them leverage their efforts and develop more work for the firm, or they're not sure what business development support can be useful. Either way, they will likely benefit from focused assistance.

For example, one firm recently developed a plan to communicate a tailored "value" message for key clients and prospects, and then presented it to key rainmakers who had relationships with clients and prospects that could benefit from the message. Some participated, while others did not. Nevertheless, that firm is now implementing the plan, with solid early results.

Too often, because a firm's top rainmakers are exceptionally busy and have formidable personalities, they do not initiate new approaches and/or are never asked what support they might want. Now is the time to check in with all the major rainmakers in your firm — especially those who have used internal marketing and business development support in the past, who are interested in developing more work for the firm, and who are able to be team players.

From "Business Development: A Necessity in Today's Economy," by **Julie Savarino**, managing director of Business Development Inc. ([www.BusDevInc.com](http://www.BusDevInc.com)), published in the March 2009 issue of *Legal Management* magazine (<http://www.alanet.org/publications/issue/mar09/LM-Mar09-BigIdeas.pdf>).

### • Biz Dev trends

• **Business development coaching.** More firms are accepting the fact that lawyers need training in developing new business. But it's far more than just sales training. The good coaches also have an understanding of psychology and human behaviour.

• **Marketing departments.** A year ago, we reported firms were increasing both marketing staffs and budgets. Now a few firms have started to reduce them. But competition is increasing dramatically as the economy worsens, firms dissolve and clients become even more demanding. This means marketing and BD programs should be increased.

• **Full-time client interviewers.** Several more firms have hired them. But for strategic planning, other firms continue to use outside consultants for both client and market surveys.

• **Social networking.** LinkedIn, Facebook, Legal OnRamp, Twitter, etc.: like any new development, use of these sites raises many questions: Does it lead to worthwhile relationship building? Is it really effective in developing business? What are the ethical issues and risks? Should firms adopt social media policies or guidelines, as some corporations have done?

• **Relationship management.** New technology such as ERM (for electronic resource management) now enables firms to identify many more contacts. In the words of one marketing director, "This knowledge transfers data into a firm asset."

By **Robert Denney**, president of Robert Denney Associates, Inc., a strategic management, marketing and strategy consultancy ([www.robertdenney.com](http://www.robertdenney.com)). Excerpted from a longer article in the January/February 2009 issue of the ABA's *Law Practice* magazine (<http://www.abanet.org/lpm/magazine/articles/v35/is1/pg12.shtml>).

### OFFICIAL NOTICE • AVIS OFFICIEL

#### Call for Nominations

#### Election of Second Vice-President and Treasurer

Nominations are invited for the positions of Second Vice-President and Treasurer of the Canadian Bar Association for the 2010-2011 term. Any member of the Association may be nominated for election to these positions. Nominations must be delivered to the Executive Director at the CBA National Office on or before **December 15, 2009**. For further information, contact Executive Director John Hoyles at the CBA national office: (613) 237-2925, 1-800-267-8860, [johnh@cba.org](mailto:johnh@cba.org).



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#### Demande de candidatures

#### Élection à la deuxième vice-présidence et trésorier(ère)

Nous vous invitons à soumettre vos candidatures à la deuxième vice-présidence et à titre de trésorier(ère) de l'Association du Barreau canadien pour le mandat 2010-2011. Tout membre de l'Association peut se présenter pour occuper ces fonctions. Les candidatures doivent être soumises à l'attention du directeur exécutif du bureau national de l'ABC, à Ottawa, le **15 décembre 2009 au plus tard**. Pour de plus amples renseignements, veuillez communiquer avec John Hoyles, directeur exécutif, au bureau national de l'ABC: (613) 237-2925, 1 800 267-8860, [johnh@cba.org](mailto:johnh@cba.org).