Best Practices in Practice Development

By David H. Maister

1. Manage total marketing time as one aggregate time budget, reviewed monthly, so that the overall balance between competing marketing activities can be monitored. Don't fragment it among many decision-makers.

2. Require that all staff contribute some time to organized marketing efforts.

3. Establish regularly reported metrics to assess the caliber / quality/ strategic value of new revenues, and not just their volume.

4. Have an organized, regular program of inviting clients in to talk to your people

5. Establish research department to keep delivery staff informed on a regular basis as to trends, developments and latest news in each client's industry (monthly updates.)

6. Have one of our people attend every client industry meeting that exists, and have our person write up what they heard, both in formal sessions and at breaks.

7. Train all client contact staff in client counseling skills, how to earn trust and how to deal with difficult situations. Shut down “Sales” training programs.

8. Develop (constantly updated) workbook of tips and tactics for how to render greater perceived value (give the client a better experience with us) at all stages of an assignment.

9. Top management follow-up with clients on all client feedback that is less than "all top scores." React to anything that is less than excellent.

10. Use results of systematic client feedback in setting bonuses at all levels

11. Offer an unconditional satisfaction guarantee

12. Ask satisfied existing clients to give endorsements on video (put on website)

13. Have an organized program for all clients to be visited regularly by senior officers

14. Inviolable, explicit non-billable investment budgets established and planned in advance to invest in individual client relationships by doing something for the client (not selling.) Monitor the execution.

15. Systematic program to offer to attend internal client meetings, critique their internal studies, put on free internal seminars for their staff.

16. Establish a program of seconding your staff to work in the clients' organization

17. Organize a regular program of proprietary research, surveying clients and their views and concerns, so you can regularly tell you audience what their peers are thinking about and doing. Use surveys to publish articles, give seminars and speeches with proprietary business (not technical) content. Be THE source of new information and ideas for your clients.

18. Develop screening form to evaluate new client pursuit opportunities. Turn away junk work. Stick to it.

19. Pursue fewer targets with greater level of effort each

20. Sales process designed to give value, be generous with ideas and earn trust.

21. Make your website full of content useful to clients (and little else.)

David Maister is the author of *Managing the Professional Service Firm* (1993), *True Professionalism* (1997), *The Trusted Advisor* (2000) (coauthor), *Practice What You Preach* (2001) and *First Among Equals* (2002) (coauthor.)

Prior to launching his (solo but global) consulting practice in 1985, he served as a professor at the Harvard Business School.

TEL: **1-617-262-5968**
E-MAIL: david@davidmaister.com
WEBSITE: www.davidmaister.com

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