

Welcome to the Synergy project.

Adding value to your client experience, at no cost to you.



The Synergy Project

A new way for professionals to work together.

If you are in professional services, chances are your most valuable asset is your client relationships.

You know there is more you could do to add value to those relationships, if only you had the time.

HOW DOES IT WORK?

1. We work with you to identify clients where our life planning and coaching can support the work you already do with your clients.

2. We work in collaboration with you whilst you are working with your client to provide a truly individualized client experience.

3. We continue to actively manage your ongoing client relationship after your work with the client has finished.

WHAT IS OUR VALUE PROPOSITION?

Targeted and personalized ongoing CRM and BD for the practice area of the lawyer.

Enhanced opportunities for cross selling other practice areas of the firm, through the ongoing relationship between us, the client and the Law Firm.

Enhanced brand value for the Law Firm, through the delivery of a profoundly individualized client experience.

HOW DO WE CHARGE?

We charge the client an initial fee of 1 - 2% of assets, depending on the level of support required and the assets held by the client, subject to a minimum fee level.

Our charging structure is flexible. We can charge the client directly, deduct our fee from the assets of the client, or be paid by the firm in whole or in part, if you wish. Typically, the fee payable reduces with the level of support required over time.

HOW DO WE MAXIMISE YOUR BD SPEND?

We work collaboratively with your existing BD and CRM functions.

The founders of the Synergy Project have a long history of collaboratively supporting BD and CRM in Law Firms, and we understand that everything we do must align with the overarching strategy of your firm.

TO FIND OUT MORE CONTACT

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