Play to Win

Increasing Contact With Clients

By Sally J. Schmidt | Jan.21.16 | Business Development, Client Relations, Daily Dispatch, Law Firm Management, Play to Win

The more I conduct client feedback interviews, the more I realize how few quality contacts lawyers make with their clients outside the substantive legal work being done. The number of times clients fumble for the name of a lawyer who is actively involved in one of their matters is pretty astounding. Recently, one client said, "I can't remember who it is and I've never met him."

No matter how brilliant your advice or how good your results, client relationships need tending. Clients often say that good lawyering is assumed; one representative comment underscores the point: "It goes without saying they are great lawyers. If they weren't, I wouldn't use them."

So how do you create a special bond that goes beyond the work?

Ways to Become a Trusted Advisor

There are innumerable ways to reach out to clients. My suggestions do not involve arms-length counseling, such as sending an article via email, or subtle communications, like, "Be sure to think of us for the next matter you have." The idea is to have a conversation or connect on a more personal level.

Here are some ways to do it:

- **Celebrate a success.** Organize a party to recognize the close of a great transaction or a terrific litigation result.
- **Deconstruct a recent matter.** Sit with the client's team to conduct a post mortem on a case or deal — what went well, what could have been done better — so everyone learns from the experience and can apply it to future work.
- **Discuss the company's plans for the coming year** — legal and business.
- **Look ahead together.** Set up a meeting to talk about legal issues that might affect the clients, such as pending cases or regulatory changes. Don't rely on firm newsletters or alerts to bring important things to their attention.
- **Get familiar.** Ask about the company's competitors and how they differentiate from the client.
- **Learn from the big picture.** Conduct an "annual review" of work done in the previous year … and discuss what might be coming down the pike.

- **Take initiative.** Present a new idea for the client's consideration, such as an "audit" of an area, a new service or an alternative fee arrangement.
- **Express interest.** Ask for advice on how to learn more about the client's business or industry — associations to join, publications to read, conferences to attend.
- **Get better connected.** Ask for assistance, such as an introduction to the company's outside accountant.
- **Expand your relationship.** Meet more people at the client entity, like the HR director, the CFO or others on the legal staff.
- **Provide resources.** Introduce the client to a colleague who might be able to provide advice or value in another practice or geographic area.
- **Keep them in the loop.** Provide a status update of all the active matters for the client and where they stand.
- **Most important, request feedback.** Ask what you can be doing better and what else you and your firm can be doing for the client.

Always Make It Personal

Everyone is busy, but an invitation to get together with a valued client for these kinds of reasons is almost always gladly accepted. It is best, of course, to make your interactions face-to-face. If things like cost or geography are considerations, some activities can be done adequately by telephone. The point is to make the contact personal.

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