Play to Win

Building Relationships With Contacts

By Sally J. Schmidt | Jul.07.16 | Business Development, Client Relations, Daily Dispatch, Marketing & Business Development, Networking, Relationships

Years ago, someone told me about an accounting firm's business development training philosophy. The firm had developed a continuum from 1 to 10, where "1" was something like "Would recognize me on the street," and "10" was something like "Take family vacations together." They asked the professionals to list their top contacts and indicate where each of their relationships fell on the continuum. After this exercise, the firm advised the accountants that their goal should be to move each contact up one number per year.

I've always liked that concept because it illustrates how long it can take to build connections with people. Many lawyers are either anxious or unrealistic about how quickly they can develop the close, trusted relationship needed to win business from a prospect (or even new business from a client).

In short, you can only go so far, so fast.

One Step at a Time

Instead of being discouraged, be creative in thinking about how to move each contact along a continuum — each communication or "touch" should advance the relationship. Here are some examples:

Example 1: A woman you met at an association of HR professionals to which you belong who works at a company that could be a good source of business.

- Invite her to connect on LinkedIn (with a personal note).
- Add her to the firm's distribution lists for appropriate e-alerts or invitations (e.g., the firm's labor and employment law updates).
- Set up a Google alert on her and her company so you can be advised of changes or news about them. These will give you opportunities to follow up with congratulations or questions.
- Plan to sit next to her at the next association function.
- Once you are connected on LinkedIn, review her profile for common contacts.

Example 2: A neighbor who is the CFO for a hospital and who could be a good source of M&A and contract work.

- Invite him to the firm's health-care seminar or plan to attend an industry conference together.
- Ask if you can have a tour of the hospital or administrative offices.
- Conduct an "informational interview" to learn more about his sector of the industry.
- Interview him for an article you are writing.
- Take him to lunch with a few carefully selected people — a colleague with relevant experience, for example, or another client who would be good for him to know.

Example 3: A financial institution client who has only used your firm for one-off projects.

- Offer to review some loan documentation free of charge.
- Offer to provide in-house training for loan officers or CLE for the legal department.
- Ask how you can expand your services into other areas — for example, can you provide a proposal to be panel counsel in a new line of business?
- Conduct a satisfaction interview after completing the next project.
- Refer some business to the bank.

The actions you select should depend on how well you know the person and your objectives for the relationship. Are you trying to get the contact to know your expertise better or send you a file? Are you trying to build a closer personal relationship or educate the target about other firm services?

Once you determine where you are trying to go with a relationship, it becomes much easier to figure out the next step … and then the next steps after that.

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