

Play to Win

Lawyer, Know Thy Client

By [Sally J. Schmidt](#) | Jul.28.16 | [Business Development](#), [Client Relations](#), [Daily Dispatch](#), [Legal Marketing](#), [Play to Win](#)



Recently, I interviewed the partners at a law firm as part of a marketing assessment. I asked each of them whether there is any particular industry or type of client the firm should target for business. One of the lawyers said to me, “I don’t understand that concept. It doesn’t matter to us what the client is doing or selling; we can still provide our services.”

It got me thinking about the whole notion of understanding what makes a client tick. How would you feel if you were looking into software to help manage your firm’s finances and the salesperson called your clients “customers,” didn’t understand how a partnership structure works and was unaware that lawyers bill their time?

Everyone wants vendors or service providers to speak their language, understand their business and appreciate their issues.

Learning the Ropes

Whether you want to make the investment to learn more about an important client or as part of a broader effort to market to a particular industry segment, here are some ways to learn the ropes.

- Tour a company’s operations. Visit the construction site, walk through the plant or attend an open house in the company’s new space.
- Talk to a lot of people at the company. Visit with engineers who created the products. Talk to the people in HR. Interview the risk managers.
- Offer to sit in on planning or board meetings, no charge, to learn about the business.
- Conduct an informational interview with a company executive to learn more about the business. Ask about the competition, industry, resources and challenges. Request an organizational chart.
- Read the company’s website, marketing materials and promotional information. Ask if you can be put on routing lists for internal newsletters or publications.
- Learn the industry’s terminology and acronyms. If you’re not familiar with something, Google it or ask a contact.

- Set up an alert through Manzama or Google on the company and your contacts there to track announcements, events and changes.
- Set up alerts on the company's industry and on the company's competition to learn about developments and see what positive or negative events occur that may impact your client or contacts.
- Join an industry association. Attend meetings (with a client, if possible) to find out what issues are top of mind and what trends are being discussed.
- Read industry blogs, newsletters and magazines.
- Follow the company on social media — LinkedIn, Twitter, Facebook — to see what they are posting. Join related groups on LinkedIn.
- Use the language of the client. If they call employees "team members" or "cast members," then you should, too.
- Know when the client may have issues so you can anticipate needs. What is their fiscal year? When do they ramp up for board meetings? Key dates will often impact the client's availability and the information they need from you.

There has been some research concluding that clients care more about what you know about their business than what you know about the law. Plenty of good lawyers can handle a particular type of legal matter substantively. What clients want is someone who can apply the law within the context of their business and with an appreciation for their situation.

Sally J. Schmidt is President of [Schmidt Marketing, Inc.](#), which offers marketing services to law firms. Sally was a founder and the first President of the Legal Marketing Association. She is a Fellow of the College of Law Practice Management and was one of the first inductees into the LMA's Hall of Fame. She is the author of "[Marketing the Law Firm: Business Development Techniques](#)" and "[Business Development for Lawyers: Strategies for Getting and Keeping Clients](#)." Sally writes *Attorney at Work's* "Play to Win" column. Follow her on Twitter [@SallySchmidt](#).