Marketing

Building Relationships with Non-Clients: 20 Next Steps to Take

SALLY SCHMIDT | It's a typical scenario. You're a lawyer looking to develop business. You meet someone new at an association meeting or networking reception. You have a nice conversation, get a business card and return to your office. Now what?

For many lawyers, taking the next step with a prospective client is a formidable challenge. Of course, there are passive activities that can and should be done, such as adding the person to your contact list and getting him or her in the firm's database to receive appropriate materials like newsletters or seminar invitations. But if you are interested in truly advancing the relationship, you will need to make a personal effort to follow up.

You have two objectives in moving forward. The first is to position yourself as a resource, so the prospect concludes that having a relationship with you provides value. The second is to start building a personal relationship, so the prospect sees you as a trusted advisor or authority. Some activities will accomplish one objective; others will contribute toward both of them.

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Here are 20 different action steps, from the more passive to the more aggressive, that can be employed to follow up with new relationships. What you do will depend on your personality, your comfort level with each activity, and how well you know the prospective client.

A Menu of Personal Follow-Up Activities

1. Fire off a follow-up note. Make it a personal, handwritten note and say it was nice to meet the person. Also refresh the contact's memory by mentioning something specific about the encounter or the discussion you had.

2. Send some follow-up information. Think of something related to your conversation that would be of interest to the person, such as an article, form, checklist or white paper.

3. Invite the contact to participate in a firm activity. And don't rely on the firm's institutional invitations to open houses, seminars or roundtables. Make a phone call and extend the invitation yourself. In some instances, you can create an event specifically designed to engage one or more good prospects, like a roundtable discussion with existing clients in the same industry.

4. Send substantive firm marketing materials along with a personal message. A firm newsletter with a hand-signed note that reads "I thought you might be interested" will actually get reviewed.

5. Offer to provide some free information. Let your prospective client know that you are willing to give a little helpful advice at no charge, whether it's a budget number or a response to a quick question.

6. Ask the contact to provide you with some input. If you have plans to write an article or give a speech, ask your prospect for topic ideas.

7. Invite the contact to participate in a survey. For example, you could develop a questionnaire for people in the real estate industry about their economic predictions for the next year and include prospects as well as clients in the process. Of course, you should then provide them with the results at no charge.

8. Interview the person for an article. Let's say, for example, you are writing a piece for your local business journal on legislative proposals that will affect small businesses. You could interview your new contact as a source, include a direct quote if appropriate, and send