Play to Win

Making Clients’ Lives Easier

By Sally J. Schmidt | Nov.29.16 | Business Development, Client Relations, Daily Dispatch, Legal Marketing, Play to Win

Lawyers have a lot of questions about how to develop new business. Once they start working with a client, however, the question often becomes, “How can I *expand* the business?” The simple fact is that clients want to work with lawyers who “get” them — lawyers who understand how, as a client, I like things done, who take the time to learn my business and my situation, and who respect my guidelines and deadlines.

If you can work in a way that makes a client’s life easier, you will get more work. Period. So how do you do that?

Be Responsive and Accessible

- Meet in their offices and on their schedule, instead of yours.
- Sync with their technology.
- Acknowledge emails immediately, even if just to say, “I’ll get back to you later.”
- Return phone calls in the same half-day.
- Update your outgoing voicemail message daily so you manage clients’ expectations about your availability.
- Similarly, use your email out-of-office message when you’ll be gone for a good chunk of time.
- Discuss service protocols with your staff — should they transfer calls to your cellphone when you’re out of the office, for example?
- Make sure everyone on the team knows what everyone else is doing so questions about projects can be answered in your absence.
- Prepare a list of the team members or an organization chart so it’s easy for clients to contact your people.
- Contact clients whenever there are changes, like budget overruns or developments in a matter. Everyone hates surprises.

Take Time to Understand Clients

- Understand the business context for the legal decisions that will be made.

- Ask how, and how often, clients would like status reports from you and be diligent about using them.
- Clarify the kind of work product they are seeking. Is it a 20-page document with legal citations or a two-page summary memo?
- Determine their deadlines and meet them. If you miss a deadline, the client misses a deadline, too.
- Ask about the timing and level of detail they want in their invoices. A business owner may prefer to see "for services rendered" rather than a detailed description of his discussion with you about selling his business, particularly if the invoice goes to his accounts payable department.
- Follow clients' instructions and guidelines. Be sure everyone on the team complies, too, to avoid billing non-approved items, using language that sets off red flags or billing to the wrong projects.
- Find out about their internal schedules, such as regular in-house counsel staff meetings or board meetings, where they may have to provide updates on legal matters — then proactively provide information.
- Determine how clients prefer to receive information. For example, some people love Excel and others hate it.
- Use their jargon and terminology. If they call their staff members "team members," so should you.
- Figure out how they like to be contacted: phone, email, text?
- Find out clients' work schedules. Do they work 24/7 or disconnect when they leave the office?
- Ask what role they want to play in the matter, and how they want their own staff involved.

Continuously Improve Relationships

- Conduct postmortem conversations to learn if you met clients' expectations and what you can do better in the future.
- Provide information on key trends and developments that might affect them or their businesses.
- Look for ways to save them time and money. Put together templates, checklists or protocols that will make things go more efficiently or more smoothly on both ends.
- Prepare a client-specific annual report that outlines what the firm has done for the client each year, both on and off the clock.
- Conduct an annual relationship meeting to discuss ways to improve the relationship.

While lawyers often focus on the subject-matter expertise they are providing to clients, clients often focus on the way that expertise is being delivered. If you can determine ways to make it easier to work with you, you will create loyal and lasting clients.

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