

## Easing a Client's Transition When Lawyers Leave or Retire

By [Sally J. Schmidt](#)

April 10, 2025

*As much as clients may have loved the senior partner who's retiring, their main concern is, "What's going to happen to me?" If you're the likely successor, how will you retain the business? Consider these client transition strategies.*

### 'I'm Done'

A few years back, at the end of December, a senior lawyer at one of my client firms retired. No warning, no notice, no succession planning. He walked out the door and said, "I'm done." Unfortunately, attempts to retain his clients didn't go so well.

**Clients have a lot of options and, frankly, know a lot of lawyers.** They serve on boards with them, live next to them, play golf with them and even get pitched by them. Other firms would love your clients' business. Relationships are important, and if other lawyers at your firm aren't on the client's radar, other contacts will be first up for consideration.

As much as a client may have loved the senior partner, his main concern is, "What's going to happen to me?"

There are a lot of baby boomer lawyers still in private practice, and many have plans — stated or unstated — [to retire](#). What happens to the clients they were servicing?

### Client Transition Strategies for Successors

Client transition, and by extension, client retention, is most successful when 1) there is sufficient time to address it; and 2) the client relationship partner is willingly involved. If you are a lieutenant to a senior partner or working on a senior partner's client matters, what can you do to help retain the business once that partner is no longer with the firm?

Here are some thoughts if you are the likely successor.

- **Address the transition early.** Clients need time to warm up to a new quarterback. Facilitate introductions and invite clients into the transition conversation as soon as possible. Building relationships takes time so the longer you have, the better.
- **Visit.** Ideally, you and the senior partner would visit the client to demonstrate the firm's commitment to the relationship and create assurances that things are under control. If the senior partner is not open to visiting but amenable to the concept, you can visit alone with the senior partner's introduction. While there, take a tour and meet with the client's leadership team.
- **Demonstrate expertise.** Depending on how much interaction you have had with the client, you may need to show that you are up to the task of leading the engagement. This could be showcasing what you know about the client and its business or what you know about the law. For example, prepare summaries of cases or customize legal alerts to send the client to demonstrate your understanding of their needs (copying the senior partner).
- **Build an independent relationship.** With the blessing of the retiring partner, take it upon yourself to build a relationship of your own with client representatives. This could be through social media, social events or independent conversations.
- **Get involved in billing.** As soon as possible, transition the responsibility for overseeing the client's invoices. This will bring you up to speed with the work being done and show the client you are in charge.

Obviously, it's important to have the retiring partner be involved and supportive for these activities to be successful.

### Onboarding: Don't Take the Client Relationship for Granted

Finally, once the senior partner retires, there is one more step: Onboarding. It may not be a new client to the firm but it is a new client for you. You should take the opportunity to discuss the relationship moving forward. For example, you should ask:

- Would they like anything done differently?
- How often would they appreciate a relationship review or visit?
- Do they have comments about the current team?

There are clients who go along with the status quo but, given the opportunity, may appreciate tweaking the relationship — a different form of communication or status reporting, for example.

### **Client Transition Strategies Can Have Significant Yields**

Client inertia works in your favor but don't take the relationship for granted. They say it costs five times more to get a new client than to keep one you have. It's expensive to acquire business — developing relationships, wining and dining, marketing, and planning social events.

Whatever time or money you spend investing in client transition and retention will pay off in spades.

*Sally Schmidt, President of Schmidt Marketing, Inc., helps lawyers and law firms grow their practices. She was a founder and the first President of the Legal Marketing Association, is a Fellow of the College of Law Practice Management and was one of the first inductees to LMA's Hall of Fame. Known for her practical advice, she is the author of two books, "[Marketing the Law Firm: Business Development Techniques](#)" and "[Business Development for Lawyers: Strategies for Getting and Keeping Clients](#)." Follow her @SallySchmidt.*