

Play to Win

## Building Stronger Client Relationships Despite the Obstacles

“It’s easy to fire someone you’ve never met.”

By [Sally J. Schmidt](#)

Back in the day, lawyers had easy access to their clients. They could schedule in-person meetings, go out for lunch or drinks and run into each other at worship services or football games. Everyone was in close proximity, and social interactions arose naturally. Now, due to company acquisitions and consolidations, key client contacts are increasingly in another part of the country ... or the world. In addition, corporate ethics rules make it harder to show appreciation for business, whether by inviting clients to a game or sending a nice bottle of wine.

While it can be difficult to build personal relationships with clients, it remains essential. As one client said to me, “It’s easy to fire someone you’ve never met.”

### Ideas for Building Client Relationships

So how can you build personal relationships with clients when you have constraints like these? It may be difficult but it is not impossible. Here are some things that might work, depending on the situation.

1. **Take full advantage of times you are together.** I was interviewing an in-house lawyer for a large pharmaceutical company and asked for her thoughts on social interaction with outside counsel. She said, “I think it’s a good idea. When you travel together for business is a good time to do that. Or when they visit, it may be worth staying a little longer, spending a little more time together.” If you have meetings or depositions scheduled where clients will be in attendance, tack on some extra time to see their office or have dinner.
2. **Attend conferences together.** If your client goes to a particular professional or industry conference, plan to attend the meeting. In addition to learning more about issues the client faces, you’ll be spending valuable time together off the clock.
3. **Visit.** Take time to go see clients face to face. In some cases, they will be happy to meet with you to discuss the relationship. In other instances, you may need an excuse. Offer to present an in-house “lunch and learn” or CLE program, spend an afternoon reviewing files or conduct a postmortem on a recent case. A visit is especially important when new client representatives come on board.
4. **Find a project on which to collaborate.** Try to involve a client in things you are already planning to do. For example, if you are going to speak at a conference, ask a client to co-present. If you are writing an article, ask a client to co-author or be interviewed. If you are planning a pro bono or charitable activity, ask if the client would like to get involved. In addition to the value of the project, you will be sharing an experience together.

5. **Invite clients to visit the firm.** Ask them to attend client seminars or conferences. Put together a client advisory board to provide valuable input to management. Or invite them to speak at firm practice group meetings or retreats.
6. **Memorialize your relationship.** For example, if you are together at a charity golf tournament or similar event, take a picture. Later, send a framed copy in the hope it will be displayed somewhere in the client's office.
7. **Send personalized correspondence.** Recognize the client's personal events and professional achievements with notes and cards. A handwritten note congratulating them on a promotion or sending birthday wishes will go a long way toward making the client relationship about more than legal work. Take note of your clients' passions, from kids to cars, and find ways to work them into your interactions.
8. **Join a group together.** If the client is active in a professional or industry association, become involved yourself. Serving on a board or committee together will give you opportunities to collaborate on things outside of the legal files you share.
9. **Call for no reason.** To show a client you care as much about the person as the business, check in when you are not in the throes of a major legal issue. Ask about a recent company development or how the client is settling into new space, for example.
10. **Check and follow your client's guidelines on gifts or contributions.** It can be awkward for clients if you send something they are not allowed to accept. However, if the client's organization doesn't have a prohibition on gifts, or sets reasonable limits on gifts, show your appreciation for the business with a personalized offering. Send something from your geographic region, like a specialty food or a book by your favorite local author. Or put together a gift basket that recognizes a client's affinities, like coffee or cooking.

## Four Touchstones for Stronger Client Relationships

Having a personal relationship will make your lawyer-client relationship more satisfying. And it is particularly helpful when there is a glitch. You can overcome roadblocks to building personal relationships with clients if you:

- Take advantage of natural opportunities.
- Stay in touch between matters or activities.
- Share experiences.
- Get personal.