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# How to Make the Most of Client Visits

### A well-executed meeting on your client's home turf is a valuable activity for solidifying your relationship.

By [Sally J. Schmidt]

In one of the most memorable client interviews I ever conducted for a firm, a gentleman said to me, "I've been working with that law firm for 20 years and no one has ever been out here to see my shop." There is nothing like in-person interaction to help you build your relationship and better understand the client.

A client visit has numerous potential benefits. It can be used to learn more about the client's business and legal needs, understand protocols and processes better, explain or get feedback on the work that you have done, introduce or meet additional people and simply build a personal rapport. What you accomplish will depend on the client and your relationship.

Here are some thoughts on how to make the most of this critical activity.

## Setting Up the Meeting

There is some strategy that goes into the request to visit — for example:

- **Don't charge for it.** It should go without saying that this is an off-the-clock exercise.
- **Present the visit as a service protocol.** Advise the client that you think it's important to set aside some time to meet on a regular basis to talk about the relationship.
- **If the client is out of town, tie the visit into another trip.** This will make it more efficient for you and alleviate client concerns about your time and expense. Most clients will welcome your effort to visit. However, if you anticipate pushback, you can say, "I need to be in Nashville for something but it's flexible so I'd like to schedule it around your availability." You do need to be there — for the client!
- **Consider what you will do when you visit.** Examples of things you might incorporate include:
    1. Having some social time together, such as lunch, drinks or dinner.
    2. Getting introduced to other company representatives whom you have not met or who might be involved in future projects.
    3. Taking a tour.
    4. Presenting a CLE or lunch-and-learn.
- **Consider who should attend.** Is the goal to introduce members of your team who have worked (or will be working) on the client's matters? Or to talk about other service or geographic areas where you can be of assistance? Your objectives will drive who should be there from your firm.
- **Be sensitive to clients' situations.** If they are crazy busy with fiscal-year-end activities or an active lawsuit, for example, your visit will be perceived more as a disruption than a positive.

# Opening Your Meeting

As you begin your client visit, here are some recommendations:

- **Make introductions.** If you brought colleagues, explain who is there and why they were asked to accompany you.
- **Establish rapport.** Start with some small talk to warm everyone up.
- **Confirm the agenda.** Reiterate the purpose of the visit and what you are hoping to accomplish. This should include establishing the time specifics — has the client's availability changed since you set up the visit?
- **Open the floor.** Ask what the client would like to cover or accomplish, apart from your agenda items.

# Conducting the Meeting

How do you make the most of your time together? Below are a few thoughts:

- Your goal should be to listen 80 percent of the time you are with the client. Ask open-ended questions, ask follow-up questions and be an active listener — lean forward, take notes, nod, paraphrase and summarize.
- Try to better understand the client's business, business imperatives or legal needs.
- Look for ways to advance the relationship. Is there something you can do to help (e.g., make an introduction)? Is there a next step that would be useful (e.g., a summary of litigation matters in progress)?
- Ask for copies of any materials the client references, such as a business plan, policy or handbook.
- End on time!

# Following Up After the Client Visit

As with most marketing and business development efforts, prompt follow-up is key. In that regard:

- **Thank the client.** Send a personal thank-you note and, if appropriate, a sign of your gratitude, such as some firm swag.
- **Write a report.** Share information you learned or feedback you received with lawyers and staff who work with this client.
- **Follow up with anything promised.** In many cases, there will be assignments coming out of the meeting. These could include producing updated case information, making introductions, conducting a training program, reviewing a document or even preparing a proposal for additional work.

A well-planned and executed client visit may be the most valuable activity in which you can engage. How many will you schedule in 2019?