Play to Win

Mastering Client Visits: Essential Tips

By Sally J. Schmidt
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In-person meetings may seem like a relic, but many clients prefer face-to-face contact. Besides, showing up in real life when your competitors are leashed to their screens could be the advantage you need: There is nothing like meeting in person to build client relationships. Here are Sally Schmidt's expert, start-to-finish tips for mastering client visits.

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

A client visit can help you learn more about the client's business and legal needs, better understand protocols and processes, explain or get feedback on the work you have done and your communications and customer service, 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 client visits.

Strategy for Setting Up the Client Visit Meeting

There is some strategy that goes into the request for a client visit. For example:

- **Don't charge for it.** It should go without saying that client visits are an off-the-clock exercise. Keep in mind that these visits help align the strategies of your marketing and client development teams with actual client needs.
- **Present the client visit as a service protocol.** Advise the client that it's important to set aside some time to meet regularly to discuss 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 their concerns about your time and expense. Most 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 your team can be of assistance? Your objectives will drive who should be there. (Read "Cross-Selling Made Simple.")
- **Be sensitive to clients' situations.** If they are 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 the Meeting

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

- **Make introductions.** If you brought colleagues from the client team, 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 hope 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?

- Your goal should be to listen 80% 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. (Read "Ask Don't Tell: The Power of Questions in Business Development.")
- Try to better understand the client's business, their 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)? (Read "Create Informational Tools for Your Clients.")
- Ask for copies of any materials the client references, such as a business plan, operations manual, policy or handbook.
- End on time!

Following Up After the Customer 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 customer visit report.** Share the information you learned or feedback you received with the client team and any other lawyers and staff who work with this client. This report should document key insights, memorable moments, and any action items that emerged during the meeting.
- **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. (Read "Following Up Naturally: Tips for Nurturing Business Relationships.")

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

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.