Play to Win

Create Informational Tools for Your Clients

It's one thing to say, "We understand the process." It's another to show it.

By Sally J. Schmidt

Years ago, I was working with a firm that had just won a large engagement involving an environmental matter. They showed me their brilliant proposal, which included a Gantt chart outlining in great detail the process and estimated timeline for regulatory approvals.

It's one thing to say, "We understand the process" — it's another to show it.

Although much time has passed, I still don't see enough tools like this — for example, process maps, charts, timelines, who-to-call lists or decision trees. They help clients avoid surprises; they organize key information; and they result in fewer questions like, what's the next step, who should I call, or how long will it take? In many cases, informational tools will make your process more efficient, as you won't reinvent the wheel every time you take in a new client or matter in an area.

And, as noted, these tools can be persuasive to prospective clients by demonstrating a level of knowledge that comes with experience.

Every Practice Has Opportunities

There are many possibilities for useful materials depending on the type of work you do and the kinds of clients you serve. Some tools can be client-specific. Others can be developed for all clients in a particular industry or with a particular legal need.

Here are some examples:

- A decision tree for a client's litigation strategy (if this, then that)
- A chart showing the status of medicinal and recreational marijuana laws in each state
- A checklist of employee benefits due diligence issues for M&A transactions
- A flowchart of the liquor licensing process for the city
- An annual calendar with key filing or reporting due dates filled in
- A pipeline document showing the status of real estate deals for a particular client
- A Gantt chart of the trademark process
- A list of governmental contacts a client will deal with in an approval process

Many documents will require continual updates, which is a good thing. Revisions provide you with ongoing marketing and client communication opportunities.

Try Creating Some

The easiest way to create a tool is to track steps or information the next time you handle a matter in the area. Then develop a document and make it look professional by branding it, using color, inserting graphics and laminating it, for example. From there, use it in the first meeting with a new client and review it frequently thereafter as part of your status-reporting process.

You may be surprised how much value clients will find in your attempt to give them a road map.