



by Sally Schmidt

Clients have a lot to say about legal services—both good and bad. Unfortunately, many lawyers never bother to ask.

Time and time again, clients have said that the quality of the legal work is not the only criterion used to evaluate a lawyer's performance; the factors related to the devility of the service—such as communications, interpersonal skills, interest, and rapport—are equally, and sometimes even more, important. In fact, many professional liability claims are a result of poor communications or misunderstandings.

Client relations is the responsibility of every lawyer, whether an individual practitioner or a member of a large firm, a senior partner or a first year associate. One of the basic tenets of marketing is that efforts should begin with existing clients. It is more effective and less expensive to maintain existing clients than to develop new ones. The goal is not to get clients, but to *have* clients. And one way to keep the clients a firm has is by practicing good client relations.

The following sections are excerpts from "What Clients Say: A Lawyer's Guide to Better Client Relations." This 35-page booklet was written by

## RUNNING THE PRACTICE

# How to Find and Keep the Keepers Attention to Detail, Clients Makes the Difference

Sally Schmidt to help lawyers become more sensitive to the needs and desires of their clients. The content is based on discussions and interviews with dozens of law firm clients, and includes practical tips which lawyers can put to immediate use.

## Clients and Meetings

Some representatives of a company were pleased when their lawyers offered to drive out and meet with them at their offices in the suburbs ... until they got the bill. Not only did the lawyers charge for travel time, they added on the price of a rental car!

How you arrange and conduct client meetings sends numerous verbal and non-verbal messages to clients about their importance and your interest in their situation. Meetings provide critical opportunities to build rapport and establish trust — if you handle them well.

### Tips:

- Be on time! The client's time is as valuable as yours - and they are paying for yours.
- When clients are in your offices:
  - Greet them in the lobby; walk them to and from your office.
  - Insist on no interruptions. Tell your secretary

within earshot of the client, "I don't want to be disturbed."

- If you must take a call, apologise to the client in *advance*.
- Have only the client's files in front of you; you will look more organized and it will make him or her feel like your only client.
- Don't have other client's files laying around your office; clients may fear their files will be laying around some day for others to see.
- Don't make clients wait in the reception area for more than five minutes. If you are unavailable, have your secretary greet them and take them to the appropriate room.
- Give clients something written to follow, such as an outline or agenda, so they feel more involved in the meeting. It doesn't need to be done in great detail.
- Don't get right down to business; take a moment to build rapport. Being friendly only takes a few minutes.
- Be an active listener in client meetings. Sit forward, make eye contact, and take notes. (Clients may wonder how you possibly can remember everything they said.)
- Hold meetings at the client's place of business when possible.
- Review any notes you made from the last meeting to

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provide you with openers ("How was your trip to Canada?").

- Introduce the client to other attorneys and to your secretary as you move through the halls of your firm. This fosters a sense of belonging to a team.

- Tell clients if you are rescheduling a meeting for them or are somehow going out of your way to accommodate them.

- Tell the receptionist if you are expecting a client; the receptionist can greet clients by name and let them know they are expected.

## The Personal Touch

Upon learning that a local client was transferring in a new assistant in-house counsel, an attorney at one of the law firms sharing the company's outside legal work made contact immediately with the new lawyer. He arranged for the newcomer to meet an excellent realtor, set up a dinner during the gentleman's next visit, and offered to sponsor his membership at a local private club. Needless to say, the new lawyer looked upon the firm favorably after his transfer was complete.

Inevitably, the lawyer-client relationships which are the longest and strongest go beyond a simple professional relationship. In these cases, it is the attorney's interest in the client as a person, and his or her goals, interests

and needs, which has strengthened the relationship. There are many ways to demonstrate a sincere interest in the client as an individual.

### Tips:

- Acknowledge business and referrals which are received from the client by sending a personal note of thanks.

- Send a card or note to acknowledge a client's promotion. Copy appropriate people.

- Learn special personal information about clients, such as birthdays, social groups to which they belong, professional or trade association activities, the names of spouses and kids, and hobbies.

- If you have trouble remembering personal information, keep a 3x5 card on each client or jot the information on rolodex cards.

- Give small but meaningful gifts, such as a book on a subject of interest.

- Send a letter to welcome new representatives of client companies, including your direct telephone number, your secretary's name and telephone number, and any file numbers or pertinent information which they may need.

- Talk about your own activities from time to time, so you become more than just a lawyer to them. One lawyer

developed a strong friendship with a client after getting him involved in his jockey team.

- Try to help clients personally; be their friend. Help them to get involved in organizations or in the community, if they are interested.

- Look around a client's office for clues about what is important - a degree, a picture, an award, etc. These will also give you conversation openers.

- If appropriate, send clients notes of condolence.

- Invite a client to a seminar or luncheon of interest as your guest.

- Look for opportunities to honor or recognize clients. One law firm regularly entered clients in local "Small Business/Entrepreneur/Woman Business Owner of the Year" awards programs and was responsible for producing several winners.

- Keep in touch with mutual acquaintances. Try to get involved in the client's networks.

- Invite a client to be a speaker at a professional or firm seminar, or to co-author an industry-related article.

- If you are in another city, make it a point to call on people you know (former classmates, firm clients and referral sources). Even if they can't arrange to see you, they will see your message and appreciate your effort.

- Get together with clients socially. Invite spouses occasionally, so the client isn't always forced to choose between "work" and "home." Know the client's interests when making plans, however; not every client is interested in the opera or in baseball.

- Volunteer firm resources to clients, such as the use of your conference rooms or facilities. This is particularly appreciated during times of urgency or difficulty. One firm responded quickly to a client in crisis by going to the site and helping to fend off inquiries from the press. Another firm used its own in-house marketing director to set up a press conference for a client's major announcement.

- Do business with clients. Buy their products or use their services, just as they use yours.

- Sponsor a client event; buy tickets or advertising space for activities that are important to clients.

- Be accessible after hours. Give important clients your home telephone number in case of emergency.

- Above all else, care.

*"What Clients Say" can be purchased by contacting Sally Schmidt Consulting at 2116 Vienna Lane, Eagan, MN. 55122 or calling (612) 452-6044. Prices are: First copy, \$25, subsequent copies up to 25, \$7.50 each; over 25 copies, \$5 each.*