Marketing

Building Relationships with Non-Clients: 20 Next Steps to Take

SALLY SCHMIDT | It's a typical scenario. You're a lawyer looking to develop business. You meet someone new at an association meeting or networking reception. You have a nice conversation, get a business card and return to your office. Now what?

For many lawyers, taking the next step with a prospective client is a formidable challenge. Of course, there are passive activities that can and should be done, such as adding the person to your contact list and getting him or her in the firm's database to receive appropriate materials like newsletters or seminar invitations. But if you are interested in truly advancing the relationship, you will need to make a personal effort to follow up.

You have two objectives in moving forward. The first is to position yourself as a resource, so the prospect concludes that having a relationship with you provides value. The second is to start building a personal relationship, so the prospect sees you as a trusted advisor or authority. Some activities will accomplish one objective; others will contribute toward both of them.

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Here are 20 different action steps, from the more passive to the more aggressive, that can be employed to follow up with new relationships. What you do will depend on your personality, your comfort level with each activity, and how well you know the prospective client.

A Menu of Personal Follow-Up Activities

1. Fire off a follow-up note. Make it a personal, handwritten note and say it was nice to meet the person. Also refresh the contact's memory by mentioning something specific about the encounter or the discussion you had.

2. Send some follow-up information. Think of something related to your conversation that would be of interest to the person, such as an article, form, checklist or white paper.

3. Invite the contact to participate in a firm activity. And don't rely on the firm's institutional invitations to open houses, seminars or roundtables. Make a phone call and extend the invitation yourself. In some instances, you can create an event specifically designed to engage one or more good prospects, like a roundtable discussion with existing clients in the same industry.

4. Send substantive firm marketing materials along with a personal message. A firm newsletter with a hand-signed note that reads "I thought you might be interested" will actually get reviewed.

5. Offer to provide some free information. Let your prospective client know that you are willing to give a little helpful advice at no charge, whether it's a budget number or a response to a quick question.

6. Ask the contact to provide you with some input. If you have plans to write an article or give a speech, ask your prospect for topic ideas.

7. Invite the contact to participate in a survey. For example, you could develop a questionnaire for people in the real estate industry about their economic predictions for the next year and include prospects as well as clients in the process. Of course, you should then provide them with the results at no charge.

8. Interview the person for an article. Let's say, for example, you are writing a piece for your local business journal on legislative proposals that will affect small businesses. You could interview your new contact as a source, include a direct quote if appropriate, and send

a copy once the article is published.

9. Look for ways to use or recommend the contact's products or services. If a prospect owns a restaurant, patronize the establishment. If prospective clients offer services, such as consulting, technology or accounting, put their names on short lists of potential suppliers for the firm's, or other clients', needs.

10. Take the prospect to lunch or dinner. Be prepared to ask about business or professional areas of mutual interest.

11. Ask the contact to be a speaker or serve on a panel for a firm or outside conference. In addition to allowing you to work with the prospect, you will be helping him or her professionally through exposure to your conference audience.

12. Invite the person to join a group that would be of interest. This could be an association, a committee or even a basketball league.

13. Offer to review some company information and provide feedback at no charge. Depending on your practice area, this could be the company's business plan, a standard contract or an employee handbook.

14. Make connections for the prospect. Who else in your network might be of use to the new contact, professionally or personally—a colleague, an accountant, a particular vendor? Offer to make the appropriate introductions.

15. Invite the prospect to be on a planning or steering committee. If your practice area is considering offering a seminar series for financial institutions, for example, you could invite a new banking contact to serve with a group of other industry clients or prospects to help devise the program format and content.

16. Ask the prospect to be your co-presenter at a seminar. Working side by side with the contact to develop and present the materials will help you build a relationship while demonstrating your substantive expertise. This also positions the prospect professionally.

17. Entertain your contact. Invite him or her to play golf, go to the theater or attend a ball game with you.

18. Ask the prospect to co-author an article with you. As with a seminar (number 16), this requires you to work side by side and brings two-way benefits.

19. Offer to come to the contact's place of business to provide some free training or conduct an audit at no charge. This gets you into playing the role of a counselor in the person's business.

20. Ask to take a tour of the company. Showing an interest in the prospect's business, whether it's a car dealership, corporation, factory or construction site, will demonstrate your accessibility and how you like to interact with clients. Importantly, you will also likely learn some information that will be useful in developing the relationship further.

Be Smart about Your Activities

Presuming the circumstances are right and the contact is actually a prospect—meaning a person who needs your services—it still takes time to turn someone from a prospect into a paying client. Moving the relationship forward requires sustained follow-up and interaction. While you have multiple choices in how to follow up, here's the key thing to remember in selecting your activities: The most effective will be those that allow prospects to become invested in your firm or your relationship, make the prospects look good or advance their own interests, and provide added value—such as useful information or sometimes just fun. LP