

Play to Win

Keeping Clients While Managing Extraordinary Change

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Keeping clients when your firm is changing is a tricky business and involves a lot of reassurance — not just for them, but for you.

I vividly remember interviewing a client about his relationship with his law firm, my client. While he was very satisfied with the firm's work and the people doing it, he moved quickly on to his top concern. Unbeknownst to me but known by him, the senior partner who served as the primary point of contact was dying of cancer. The client said to me, "I feel terrible about it ... but what is going to happen to me?"

Even when there are great lawyer-client relationships, clients are concerned about their own interests. They notice when senior lawyers start spending more time at their condos down south, or when younger lawyers come and go on their work and invoices.

The Challenges to Keeping Clients

Any number of events can create a potential challenge to retaining a client, including:

- The departure of a lawyer
- A change in company ownership
- The death of a lawyer
- [A change in company leadership](#)

In general, law firms do a poor job of establishing the kind of institutional relationship that binds a client to the firm. In some cases, it's because of ego or compensation; in some cases, the nature of the lawyer-client relationship can't be replicated. And in some cases, it's a lack of confidence in colleagues. While you can't guarantee that clients will connect with new firm contacts (or vice versa), you can do many things to make planned or unplanned transitions go more smoothly.

Keeping Clients: If You Need to Triage

In the event of an unexpected change, here are some smart steps to take:

- Have the managing partner or client relationship partner contact the client immediately to establish that the client is a priority. The goal is to reassure the client that everything is being handled and that people are familiar with the client's issues. Offer to meet with or talk to the client to review the relationship and plans for the future.
- Ask what information would be helpful. For example, a new client decision-maker might benefit from a list of matters in progress.
- Set up methods to introduce new contacts at the company or the law firm. This could be done through face-to-face meetings, Zoom or telephone calls.

- Provide [a client team chart](#). This document, with pictures of assigned firm personnel, their roles and responsibilities (e.g., geographic coverage or substantive expertise) and contact information, will make it easy for clients to learn about and access their firm contacts.

Once you take these immediate actions, you can move into a planning phase.

Keeping Clients: If There's Time to Plan

In many cases, it is apparent from a senior lawyer's age or years of experience that, at some point, a transition will need to be made. While it can be difficult to broach, the sooner succession plans are made, the better; clients need time to digest the changes and become comfortable with the proposed arrangements.

How can you facilitate an institutional bond?

- **Look at all the existing and potential points of contact with the client and make assignments for relationship development.** This could include LAA's, paralegals and other staff members as well as lawyers.
- **Determine the appropriate lieutenant(s) who will be groomed to take over responsibility for the client.** In some cases, the selection will be driven by substantive skills; in others, personality may be key. The proposed successors should be phased in through communications, matter oversight, billing and relationship building.
- **Communicate the transition plan to the client.** This includes who was selected for the relationship and why. (This is another good place for a client team chart.)
- **Allow the team to be visible to clients.** The primary attorney should promote interaction between client representatives and team members to develop a level of comfort and trust. This could include having file reviews or relationship meetings, including team members on calls and emails, visiting the client with the team, having lawyers provide client seminars or training in their areas of expertise, planning social activities and "meet and greets" or even working on community service projects together.
- **Plan specific ramp-up activities for firm representatives new to the client relationship** (e.g., attending client training sessions, attending pipeline meetings with the client, taking a tour, etc.).
- **Ask for the client's feedback.** As things progress and others get more entrenched in the relationship, it's important to let the client provide input on the transition. For example, here is a comment from one client about the firm's suggested new point person: *"From a succession standpoint, there's an issue: No one yet fits the bill. [Lawyer B] thinks he will do this, but he hasn't earned my trust to the extent [Lawyer A] has. They need to know this."*

What Would Happen If ...

I don't know how often people get hit by busses but clients talk about it a lot —"What would happen if [lawyer] [gets hit by a bus?](#)" While you may never be able to duplicate the original relationship, others in the firm can offer many positives, from different ways of looking at things to a new level of appreciation for the client.

Whatever the transition plan, the key to retaining clients is to start sooner rather than later.