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Keep **Existing** Clients Happy

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AS A NEW partner, one of the most important things you can do is to ensure that your existing clients are well served and happy. As you have no doubt learned by now, performing great work alone is just not enough. It is far easier to lose clients than to get new ones. Satisfied clients can be your staunchest advocates and your best source of new work and referrals.

Never forget that law is a service profession. Consider the professionals who serve you: your doctors, your accountant, the lawyer who handled your real estate closing or drafted your will. The professionals you stick with and recommend to others are typically those with whom you have a high comfort level. They understand you. They help you identify your problem, your objectives, and the best solutions. They take good care of you.

Identify the things that create the bond between you and your preferred service providers. Then see if you can adapt them in serving your own clients.

This article lays out five proven ways to keep and develop existing clients, and some practical pointers for implementing them. If they sound like common sense, that's because they are.

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But if you observe the rainmakers at your firm, you will see that most of them are masters at building relationships that lead to new sources of work. Your goal should not just be to serve your clients well, but to deepen and expand your professional relationships.

1. Communicate Effectively

Good communication leads to healthy relationships, professional as well as personal.

Listen. Professionals are programmed to have the answers, but we can usually come up with much better answers if we pause long enough to listen first. The most basic communication skill is asking good questions that draw out your client's needs and concerns and listening hard to the responses. Beware of hearing what you want to hear.

You can avoid pitfalls if you just take the time at the outset to ask your clients a few simple questions about the scope and importance of the work and discuss the steps necessary to deliver what they want in the format that would be most useful.

Be Responsive. Responsiveness demonstrates you care and that your client's problems are important to you.

Return phone calls promptly. Reply to e-mail as soon as feasible, even if just to acknowledge receipt and indicate that you are working on the substantive response. If you are unavailable, ask a colleague or your secretary to return the message to see if someone else can help. If you plan to be out of the office for an extended period and will not be able to be as responsive as usual, it is often a good idea to advise your active clients and designate someone else to move things along in your absence.

Provide Regular Updates. You should endeavor to keep your client fully informed, to educate it as needed on the legal issues (and to educate yourself on the business issues), and to work together as a team to achieve your client's goals.

To this end, get in the habit of confirming the issues presented by your client, as well as your advice, in writing and in plain English. Written confirmation helps you hone your analysis and clarify or expand your oral advice.

Provide regular updates on long-term engagements, particularly with respect to significant changes in cost estimates, since your failure to do so can undermine your client's budget and confidence in you. Do not wait until your client calls you. It is part of your job to keep your client informed of your progress, or explain why there is none.

Follow Up. Keep your matters moving by following up on open items within a reasonable period of time, well before your client raises any questions. Use a reliable suspense system that prompts you along the way. Staying on top of things and anticipating deadlines shows your conscientiousness and reliability. It may also spare your client the pain of a last-minute fire drill.

Frequently, you can establish a time-frame for follow-up in your initial communication. For example, when transmitting your comments on the other side's counterproposal on an agreement, you might say: "I would like to reply to opposing counsel by next Wednesday. If I have not heard from you, I will call you on Tuesday to ensure that I have your input."

Of course, following up can do far more than just keeping your matters on track. When you are involved with clients on particular matters, you have a natural reason to stay in touch. How did a planned meeting go? How did your advice work out? Were the business people satisfied with the result? Following up keeps channels of communication open. It is a simple way to reach out to your clients, reaffirming your continuing interest, concern and appreciation for their business.

Outline Options but Make Recommendations. Start from the premise that your clients are intelligent people who want to know both their options and your recommendations.

Once you have an established relationship with a client, you will no doubt gain a better understanding of its preferred way of communicating with you and how much detail is necessary. As a general rule, most clients appreciate a straightforward summary of their options, the pros and cons of each, a cost benefit analysis, and the approach you recommend. Conversely, most clients have little need for a lawyer who just passes along information without providing any guidance.

2. Add Value

Never Act as a Mere Conduit. Whenever you are working on a particular matter, be on the lookout for ways to add value to your client. When you merely act as a conduit—for example, forwarding a set of interrogatories or a draft of an agreement without explanatory comments—you lose a chance to prove your worth.

Brainstorm and Troubleshoot. If you are communicating with your client effectively, you are educating it and managing its expectations. You are also learning about its global needs and priorities. You are therefore in a unique position to brainstorm with your client and colleagues about creative solutions to the issues at hand, and to troubleshoot problems that have not yet arisen.

Bill Fairly. Too often, lawyers feel they must bill for every minute in their day. This puts them at odds with their clients, almost all of which are cost conscious. No one wants to spend more than the potential exposure warrants. You will earn considerable client loyalty if you are cost-effective, staff matters appropriately, and bill fairly for the work performed.

One useful approach is to review your own time entries, staffing and bills as though another law firm prepared them and your client has asked you whether they are fair and reasonable. Often, you may want to add a better explanation of the work performed and results achieved. Sometimes, you may want to reduce fees that appear excessive or give the client a courtesy discount before presenting your bill.

Entire articles have been written on using your bills as a business development tool. If as a new partner you are billing clients for the first time, you may glean some helpful ideas from reading the literature and talking to lawyers and clients about best billing practices. Clearly, you should know your clients' billing expectations, concerns and pet peeves.

3. Solve Legal Problems Creatively

Do Your Research. You need not limit your research to learning about the other side's principals, counsel, history and prior litigation. Research your own clients to know more about them too. The more you know about the client's business and industry, the better your ability to anticipate, trouble shoot and solve legal problems.

Identify True Needs and Objectives. Assuming you are communicating with your client and doing your research, you can help the client identify true needs and objectives and prioritize desired outcomes. This permits you to give pragmatic advice and to keep your eye on the prize.

Satisfied clients can be your staunchest advocates and best source of new work and referrals, so ensure that yours are well served and happy; it's far easier to lose clients than to get new ones.

For example, few clients relish litigation, which is just one solution to a business problem and oftentimes not the best one. Litigators who listen to and hear their clients can often help them achieve their business goals—as well as save time and money—through settlement negotiations, mediation or arbitration at an early stage in the dispute. Keep a checklist of alternative settlement approaches from other cases. Review them with your client to see if any apply and to prompt other ideas.

Understand the Bigger Picture. Take as a given that the legal file you have on your desk tells just part of the story. You can be a better problem solver if you spend some time learning the history of the matter, sizing up the importance of the issue, putting yourself in your adversary's shoes, and making ongoing assessments of the available alternatives. Placing the problem in perspective can suggest new solutions and strategies to achieve them.

Get a Little Help From Your Friends. In this day and age of ever increasing legal specialization, nobody knows it all. Don't be afraid to bounce your ideas off colleagues or to tap into their expertise.

Could an international arbitration clause in your deal document save your client a lot of headaches litigating in a foreign land in the event of a breach? Are there ways to structure a litigation settlement that could minimize tax liability? Are there commercial claims as well as trademark infringement claims arising out of a terminated distribution agreement? In law school we were taught to spot issues. It is one legal skill that has real practical application as you try to solve real problems.

Think Outside the Box. U.S. law evolves. It is not carved in stone. Fact patterns differ. And there is generally more than one viable approach to any legal problem. As a result, you can do your clients a favor by questioning conventional wisdom and taking a fresh look at the situation. Few things impress a client more than your ability to offer an elegant solution that hasn't occurred to anyone else before.

4. Personalize the Relationship

Care About Your Clients. Presumably, you like being a lawyer if you have stayed in the field and jumped over the hurdles to partnership. If your client's issues and concerns (as well as their lives and aspirations) don't interest you, then perhaps you should concentrate on different clients or a different specialty. The best attorney-client relationships grow out of genuine interest, concern and empathy. You cannot feign it.

Visit Your Client's Workplace. Nine times out of 10, when you take the time to visit your clients at their places of work, you learn something new. You meet new people; you see new advertising, or packaging, or literature; you hear about new business plans; you find out more about the culture of the client's organization and how it runs and is run.

People are usually more comfortable and candid in their own place of business. It is surprising how often a relatively simple fact you pick up from a client visit provides the key to unlocking a tough legal problem. It is also surprising how often you walk away from a client's workplace with more work in hand.

Find Your Natural Constituency. Strive to find your natural constituency—the clients to whom you can relate. Then the rest will flow naturally. At this stage in your career, you may not be interacting with top business and legal officers. Still, your client contacts may influence legal hiring decisions, and they may well feel more comfortable working on a daily basis with you than a senior partner with whom they have little in common.

In due course, your in-house peers will be promoted or move to other positions elsewhere. Someday, if it is not happening already, your contemporaries are going to be heading up legal departments and companies, and sitting on the bench, and running for President. Get to know them now and you increase your access and credibility later.

Try to Understand 'Difficult' Clients. Clients, like everyone else, have idiosyncrasies. Make allowances. Be patient. Sometimes, you may need to tell a client, gently but firmly, what you need and expect in order to do your best for it.

In law as in life, there are good and bad matches. Try to make a better match if you are not the right lawyer for the client. If you just can't make it work after giving it your best shot, focus your energy on better prospects.

Be Generous and Helpful. Clients may or may not be personal friends. But building solid friendships and building solid business relationships have much in common.

Put aside the notion that each of your business development activities should immediately translate into more business. It doesn't usually work that way. Instead, cast your bread upon the water.

Be generous and helpful where you can. Introduce people in your network who may be useful to each other. Offer your ear and support to clients going through big changes or tough periods. Be thoughtful. Provide updates on legal developments of interest without charge. Most likely, your kindnesses will be repaid in ways you can't even predict.

Celebrate Successes. What better way to bond with a client than over an achievement or success? Celebrate successes every chance you get. And remember to compliment the good work of others, both within your organization and within your client's. Give credit where credit is due. It reflects well on you, as well as the subject of your praise, and will be remembered.

Socialize. Let's face it. Some people genuinely enjoy business entertainment while others view it as a chore. Certainly, meeting with clients outside of the work environment can help you find common ground, understand each other better and work together more effectively. It personalizes the relationship, and makes doing business more fun. Try to find or create social events that you and your clients will both enjoy. Very few people will be put off by a thoughtful invitation.

5. Invest for the Future

Invest in Your Existing Clients. If you have ever prepared a response to an RFP or competed in a beauty contest, you know how many non-billable hours go into chasing a new potential client. Chances are that if you invest a fraction of that time in providing better service to an existing client, you will reap the reward in more work from that client and a stronger relationship in the future. So go the extra yard, even if you can't bill for it.

Read Industry Publications. One easy way to stay ahead of the curve is to read industry publications and news stories of interest to your client. Sending along clippings with a personal note is a great way to show you are thinking about your client.

Provide Ideas and Strategies Without Charge. Think again about how much non-billable time you would be willing to spend to bring in a substantial new piece of work or a viable new client, even if you were not the leading contender for the work. Now consider: Would it make sense to redirect some of that non-billable time to providing some ideas, strategies and other work product to long-time clients who know and appreciate you? Just because a client is already in the door does not mean you need to bill for every jot and tittle. Offering something of value (your time) at no charge is one way you can be helpful and generous without spending a cent.

Integrate Other Lawyers Into the Relationship. Most enlightened firms value teamwork. They reward partners for expanding client relationships and broadening the scope of work. From an institutional point of view, law firm stability comes from having a team of lawyers working together to serve the best interests of clients.

For most people, cross-selling others within their firm is far easier than self-promotion. Clients sometimes don't know that their preferred firm has sufficient depth and bench strength to handle more transactions or cases than they have already entrusted to the firm. Bringing colleagues into the mix often leads to more sophisticated advice, and it allows more personal relationships to develop at different levels of the client organization.

For all of these reasons, we strongly advocate integrating other lawyers into the client relationship when the appropriate opportunity presents itself. That said, you need to be sensitive to areas in which the client already has outstanding counsel, particularly where those lawyers have brought you into the picture, and treat them as you would have other counsel treat you.

Ask for Feedback. Your firm may or may not have formal client satisfaction surveys. Regardless, that should not stop you from conducting informal surveys yourself. Borrow Mayor Ed Koch's line: "How are we doing?"

Then follow up: "How can we improve? Do you have any issues or concerns with our work product? The lawyers you worked with? Your bills?" It never hurts to tell a favorite client that you value the relationship. Don't take good clients for granted.

Act on Feedback. Of course, once you've asked for feedback, act on it promptly. See how you can best address any points on which your client believes there is room for improvement, and then check in on your progress. Small aggravations have a way of festering. Identify them early and eradicate them.

In Conclusion

We firmly believe that successful business development plans flow from maintaining and developing existing client relationships proactively and as a matter of course. No doubt, you are already employing many of the tips summarized above, consciously or unconsciously. If not, give them a try. They work.