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# How to Obtain and Retain Clients

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**How to obtain and retain clients**

Some attorneys mistakenly believe that they can obtain and retain clients based solely on their brilliance and expertise. Yet the woods are filled with brilliant, clientless attorneys. So who obtains the business? The attorneys who not only possess the requisite legal skills, but also know how to connect and stay connected with clients.

Successful attorneys know that three words determine whether they will obtain and retain clients: Relationships, relationships, relationships. But developing and maintaining relationships takes time and energy. Are you willing and determined to spend consistent time and effort to establish and maintain these important relationships? If so, don't expect instant gratification. Even if you don't see fruit for a year or two, don't give up.

The ultimate goal is to become a "go to" trusted advisor. To become trusted, clients first have to know and like you. So how do you get clients to know, like, and trust you ? And after you obtain their business, how do you retain it?

**Know**

How do you get new clients to know you? One of the best ways is through the clients you already know. Current clients already know you, and may be willing to introduce you to their network contacts and service providers if you ask them.

If you are not a partner in a firm, you can be introduced to clients through the partners who assign the work. Start by treating each partner as a client. And as you would do for any client, consistently provide exceptional service and a superior, timely work product. If you help the partners look good and make their life easier, they may agree to bring you to client meetings. At these meetings, ask the partner, or the partner's contact, to introduce you to the up-and-coming "rising stars." Start building a relationship with these people, who someday will be the ones who assign the work.

Because clients are more likely to want to know us if they view us as an expert who is interested in them, you need to demonstrate your skills and take a sincere interest in the clients. Here are a few things that you could do:

- Ask the client whether they deal with any recurring issues and problems. Then offer to present a free workshop at the client's office that addresses them.
- Give a presentation at your office. Invite current and potential clients.

- Give a continuing legal education talk.
- Write an article that is relevant to the client's needs and personally deliver it to them. See if a trade association, business journal, business organization, or newspaper that you know your client reads will publish your article..
- Present a webinar by yourself or with a partner and invite your clients and prospects to attend.
- Discover what organizations your clients belong to or support. Consider joining one or more of the organizations and volunteering for a leadership role.
- Discover what meetings and conferences your clients attend -- ask if you can go as well, and ask to be introduced to their contacts.
- Volunteer at a nonprofit or community organization, and invite clients to join you.

Social media also is an effective way to let clients know who you are. Start with your firm's website -- keep your bio updated and consider contributing to articles, blogs, webinars and other content your firm produces. Use LinkedIn -- through LinkedIn, you can: create a community of like-minded professionals; join and participate in specific groups that are related to your and your client's business; connect with people you know; and search for people you would like to meet and use the LinkedIn network to help you meet them. LinkedIn can be an effective intelligence-gathering tool to identify and research people, companies, businesses and their contact networks. Numerous other social media and Web-based tools to get better known are available -- you may even want to create a local listing for yourself on Google at www.google.com/placesforbusiness.

Ask your marketing department to help you generate ideas to become better known. Your marketing director can help you: monitor the legal market, clients, and industries to provide the latest news and information to help you connect and find common ground with clients; provide competitive intelligence, market research, economic and industry statistics, trends, and forecasts; and assist with presentations and proposals.

If we want to know and be known, we also must develop, nurture, and maintain a network of contacts. Remember that the focus of networking is to help people. To be a successful networker, you must be sincerely committed to helping others.

Make it a regular habit to ask a question like, "Is there anything that I can do for you?" I also recommend two must-reads for successful networkers: Dig Your Well Before You're Thirsty by Harvey Mackay, and Networking Is A Contact Sport by Joe Sweeney,.

Referrals are another way to know and be known. A referral comes from a personal relationship. It is an effective way to obtain business sooner. Assuming that a prospective client knows and respects the referrer's judgment, the referral shortens the process of becoming known and trusted. If you already have a relationship with someone, visit with them and the people they know and ask for a referral. LinkedIn also is a good source for referrals.

Invite a client to lunch. During the lunch, don't ask for anything for yourself. Instead, catch up with the client and their family. End the lunch by asking that important question—"Is there anything that I can do for you?" In short, you must develop and maintain a sincere attitude to help people without ever expecting anything in return.

**Like**

Simply being an expert in the law is not always enough for you to obtain and retain clients. Often, a client's emotional response to you drives their decision. Are you a likeable person? Do you make clients feel comfortable? Who do you think a client wants to work with—a likeable person who understands them and makes their life easier, or someone who makes their life more difficult? The answer is obvious. If you are not likeable, clients probably will not hire you. But even if they do, they will not give you repeat business if you cause more headaches than you solve.

Ask yourself these questions to: Do you create the right first impression? Are you friendly? Do you make people feel good? Do people get along with you? Do people like to work with you? What are the character qualities of people who you enjoy being around? If someone asked you to list words that demonstrate likeability qualities, what would you list?

If you listed some of the words below, do they describe how you act and interact with people?

Accessible. Affirmative. Appreciative. Approachable. Attentive. Available.
Caring. Complimentary. Confident. Courteous.
Empathetic. Encouraging. Enthusiastic.
Forgiving. Friendly. Humble. Listens well. Nice.
Passionate. Polite. Positive. Punctual.
Relevant. Respectful. Responsive.
Sincere. Smiling.
Timely. Trustworthy. Understanding.

**Rapport**

Now that the client knows you and seems to like you, how do you hold their attention long enough to identify their problems and show them how you can help? You need to establish rapport. Become familiar with their business wants and needs. Research the client, their industry and competitors. Learn all you can about the background, personal interests, favorite sports and causes of the decision-maker – including using LinkedIn, Google, Lexis and other research tools. Set up Google alerts (www.google.com/alerts) to have news about the client sent right to your in box

Before you have your first meeting with the client, put yourself in their shoes. Clients are busy. They have deadlines. They have budgets to meet. They have business problems to solve. They must meet certain performance criteria and they have a boss to please. At the start of the meeting ask the client what their expectations are when dealing with attorneys. Ask what you can do to make their job easier and less stressful.

Remember that all clients are unique and so are their issues, wants and needs. Ask them what they are and then **listen**. Don't interrupt. Afterwards, acknowledge what you heard. At this point, you can share with them how you can help. Conclude the conversation with something such as: "I would really enjoy working with you. What do you recommend should be our next step?"

**Trust**

Now that the client knows you and likes you, how do you convince them that you are sincerely interested in their success and in their business? In short, how do you get them to trust you? You have to do it the old-fashioned way. You must earn it.

When deciding whether to trust you, clients ask themselves questions such as: What are your values? Are you sincere? What is your reputation in the community? Do your words and actions consistently demonstrate that it is really all about the clients and not what you can get from them? Can they count on you to spend the time to understand their situation, and how they feel about it? Do you have something worthwhile to bring to the table? Will you consistently provide timely, clear and decisive legal advice?

Clients need tangible evidence to decide if you are trustworthy. Start with a professionally designed easy-to-navigate website. Your experience, representative clients, awards, honors, leadership roles, and speaking engagements all help show that others think that you are trustworthy. But an excellent website, marketing programs, and awards are not the only factors that help show trustworthiness. Clients want more evidence. They want you to stay in touch with face-to-face meetings. They want to know that your entire focus is on them and their interests and not on you and what you can get from them.

If you want to build and maintain relationships, provide a favor before you ask for one. For example, maybe you discover that the person you want to meet would like to make a connection with another person. If you cannot make the connection for them, find someone who can. Or, you read an article that may be of interest to someone you would like to get to know or have for a client someday. Mail it to them. In addition to these simple ideas, you should create your own, more sophisticated ways to provide favors based on your clients' unique interests, wants and needs. But remember, you must develop a mindset of providing favors without any expectation of having the favor returned. Clients are smart. It will not take them long to know whether you are self-focused or client-focused.

**Now that you have the business, how do you retain it?**
Obtaining business is only the first step. You cannot afford to take any client for granted. Show that you appreciate their business and sincerely care about them and their problems. As Theodore Roosevelt once said, "No one cares how much you know, until they know how much you care."

I have always told our attorneys that business development and business retention is a contact sport. Even if you do not have a current project with the client, you need to maintain consistent contact with them. You must continually sell and re-sell yourself and your services. Stay in touch with the decision makers -- find ways to recognize them, compliment them, and show them how much you appreciate their business. Regular face-time is best, but sending them a handwritten note or card on their birthdays and anniversaries also helps show your appreciation. Another way to stay in touch is to send them relevant articles from newspapers, periodicals, and trade journals and.

Take advantage of technology – including setting up reminders in Outlook or via smartphone apps -- to keep in touch with your clients.  Arm yourself with information about what's important to your clients. I use the "Mackay 66" – questions that Harvey Mackay wrote in *Swim With The Sharks Without Being Eaten Alive* under the headings education, family, business background, special interests, lifestyle, and the customer and you – to get that information.

Last, but certainly not least, do your best work for your clients. Keep the decision maker happy and in good stead with their boss by helping them stay on budget, keeping them informed, meticulously following company billing guidelines, being accessible, and responding immediately to all inquiries. If you are sincerely committed to the success of others, you will be successful.

***Tips for an Effective Business Plan***
*To obtain and retain business, prepare a business action plan***.** *Execution is the key. To eliminate the gap between devising a strategy and implementing it, keep your plan simple.  Here are some guidelines:*

1. *Your best source of work is from existing clients. Because you or your firm has already established the connection, you have the opportunity to obtain more of the same work or even new work from them and from contacts on their network.*
2. *Who are my clients? List them and the decision maker for each one.*
3. *What is my plan this week to strengthen relationships with current clients?*
4. *What is my plan this week to build and strengthen trust with current clients?*
5. *What am I doing to ensure that the work continues to come to me from inside and outside of the office?*
6. *Are there additional business opportunities in the file that I am handling?*
7. *Are there opportunities to cross-sell legal services?*
8. *What is my plan to develop relationships with prospects?*
9. *Where is my practice now?*
10. *Where do I want it to be in 1, 3, and 5 years?*

11. *What is my plan to move my practice from point A to point B?*
12. *What am I doing to develop, nurture, maintain, and increase my network?*
13. *Remember that every person in your network has their own network. Can I approach someone on their lists for business or referrals?*
14. *At the appropriate time, ask for the work.*
15. *Thank the person for sending the work to you.*
16. *Tell the decision maker that you enjoy working with them and would appreciate receiving additional business.*
17. *Ask the decision maker to introduce you to two or three other people in their office who may send business to you.*
18. *Establish a written plan that holds you accountable to take action. Commit to spending 15 minutes every day establishing, nurturing and maintaining important relationships. But don't expect instant success. It takes time to establish and nurture relationships before they bear fruit.*
20. *Commit to life-long learning. Attend seminars, listen to webinars and read books about business development.*

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