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Want to Get Rich? Sit in Your Client's Shoes.

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By Stacy West Clark | September 20, 2023 at 11:44 AM

I help lawyers get new clients. After years of practicing law and decades of counseling scores of lawyers on business development, I do know what works; plus I am a client of several law firms myself. So, I have actually sat in both chairs. I know what I look for as a client.

It boggles my mind that many lawyers do not “stand in their client’s shoes” and try to see all things from their perspectives.

If you want more business, the most important question you should be considering is: what legal services do my clients HAVE to buy? What do they need my help with and what is the favorable outcome desired? If you focus on the answers—you will get more work.

Lawyers who don’t do this oftentimes get extremely frustrated, stop trying to market at all and go back to old, nonproductive habits. This equals no new work.

I have a list I give to my lawyers that I will share with you. Bottom line—you will get more work if you help a client do any of these things which, believe me, matter dearly to them:

- Stay in compliance with all laws and regulations
- Lessen taxes
- Grow revenues
- Keep market share
- Stay out of jail
- Reduce stress
- Improve reputation as a top corporate citizen
- Protect intellectual property, data and security
- Reduce risk and possible liability
- Prevent litigation
- Keep legal fees down—(and those of other professional service providers)
- Get deals done smoothly
- Avoid negative publicity
- Hire and retain great employees

This what is most important to them. Help them with any of this and you will be viewed as a trusted advisor and get more work.

Translate this into real life? Here are a few easy examples:

- Alerting clients to new laws that may affect them.

Are you looking ahead for your clients and identifying new laws on the local, state or federal level that will have an effect on their business or life? If not, why not? This is a huge “value added service,” performed gratis, that clients have said they appreciate. There are plenty of websites including <https://legiscan.com/PA/pending/senate-state-government-committee/id/84> to help you do this. Take this example further: When you hear or read something, do you alert your clients—before they hear about it from anyone else—specifically laying out (albeit briefly) how this law will affect them? Doing this shows a meaningful personal investment on your part in your client’s business and life. It is truly something remembered by clients.

Sit in Your Client’s Shoes

If there is a new law that will affect your clients, come up with ways to make it as easy as possible for them (and their employees) to comply. I have a client doing an excellent job setting up a database to help his clients input what a new reporting law requires. (All gratis). Assign your assistant, a paralegal or someone else on your team to oversee tracking key legislative developments for your clients on a regular basis.

- Send out client alerts or newsletters.

When you decide to write an alert to clients announcing a new development, how much time do you spend thinking about what headline will grab them, how much information they will need in the communication to take action and how much time they actually have to read what you send?

Do you get to the point in one to two sentences as to how this development specifically affects your reader? Do you close the communication with your specific contact information—rather than include a neutral sentence of “for assistance, contact your lawyer at Dewey Cheatham and Howe”? When I see law firms do that in their newsletters or alerts, I wonder if anyone does call the main number and ask for help! Would you?

Sit in the client’s shoes: If I am your client, keep all communications extremely brief (three paragraphs, tops) and personalize them (maybe use a cover letter or include a handwritten note to show that you are thinking about JUST MY NEEDS and demonstrating that this is not a mass firm mailing). Describe why I should care and then tell me what my next steps should be which could include calling you.

- Meet with clients or potential clients.

This sounds so obvious, but lawyers get it wrong all the time. Where you meet with clients should be convenient and comfortable to them. Yes, you can Zoom. But one-on-one is best, if possible, periodically. Your whole client relationship should not be on Zoom—even if your client is in another country. Also consider: the client’s commute to meet with you, directions, parking costs and time. Move over to what happens when your client tries to reach you by phone, text, or email—is it a frustrating experience or an easy stress-free one? Who answers the phone, after how many rings, can they help the client on the line or via Zoom? Have they been empowered and trained to execute this and what is their demeanor or attitude in doing so?

Sit in the Client’s Shoes

Make sure all aspects of a client’s relationship with you and your staff makes them feel like the most special client you and your firm have ever had. Check all points of contact with you and your staff. Does every entry point make them feel like they are the most important client of the firm’s? Is the experience of being your client truly outstanding and

“something to talk about” (Thank you, Bonnie Raitt). If it is, they will come back for more.

- Look at your invoice.

You and I, and our clients, all hate bills. Right? This is nothing earth shattering. If your client receives a huge or unexpected invoice from you, they are going to have a reaction. So, let's look at your invoice. It is often said that it is the most scrutinized piece of paper your client receives from you—and it certainly can be the most emotional. How are you showing value with each entry? Are you indicating how the action you took was necessary to achieve the client's objectives? Are there any surprises including the amount (good or bad?) Do you avoid legalese? Do you eliminate entries like “in-office meetings with associates”—and other pesky notations which can irritate clients if you have not previously explained to them that this will be part of your process?

Sit in the Client's Shoes!

Make your invoice a piece of paper that shows progress toward the client's goals. Show items that you did for free as much as possible on the invoice. Spell out all value-added services you provided. (Need a list of ideas of value-added services for your clients?—email me). Each line entry description should make the client feel your time and work advanced their interest and was absolutely required.

Also, at your first meeting with the client, talk about his or her preferences. Do they want information by email, a phone call or text? What is their definition of responsiveness? What information do they need on the invoice? How often would they like to meet with you? What kind of communications would they like to see, and more.

I give lawyers I work with a short checklist to use at their first meeting with a new client to nail down their preferences for the relationship. Create one that works for you (or reach out to me for a copy). It should be the “playbook” for you and your staff to follow going forward to ensure the client keeps coming back for more.

As always, I am rooting for you.

Stacy West Clark *has been successfully helping Delaware Valley lawyers and law firms substantially grow revenues for over 25 years. A former attorney with Morgan Lewis & Bockius, Stacy was the firm's first global director of client relations.*
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