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Building Trusted Client Partnerships: A Checklist



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Building Trusted Client Partnerships: A Checklist

By Julie Stauffer, January 2010

For many lawyers it's a familiar scenario. You've done good work for a client for several years, but you sense you could offer more. Instead of simply reviewing agreements, you'd love to become a sounding board on tough issues and a valued partner in their long-term success.

Not all clients are looking for that kind of relationship, of course. Some may simply need a contract drafted or a real estate deal handled, please and thank you. Nor is it worth investing a lot of time in every client you serve.

But adding value in your key-client relationships can bring big benefits - it's generally more cost-effective to win additional work from existing clients than to win new clients. Then there's the chance to tackle more complex files, enjoy a more effective and harmonious working relationship with your client, earn more referrals and encounter less resistance to your fees.

How can you progress from legal service provider to trusted advisor? When it comes to strengthening connections with key clients, a lot turns on your personal strategies and approach.

Treat old clients like new clients

"If you're not careful, the virtues of a long-term relationship quickly become vices," writes Andrew Sobel, an expert on building client relationships. "Over time, you may take your client for granted and become complacent."

In *All For One: 10 Strategies for Building Trusted Client Partnerships*, Sobel draws on the case histories of dozens of large institutional relationships that have been cultivated by a variety of professionals in different markets, including lawyers and law firms. Some of his tips on keeping client relationships vital include:

- Treating all old clients like new clients. Bring the same enthusiasm, new ideas, effort and excitement to the 100th meeting with your clients that you demonstrated in the first meeting.
- Altering the relationship experience environment. Over time, you tend to get into habits and routines in the way you manage your relationships. Organize an offsite rendezvous instead of meeting in the client's conference room.
- Asking yourself what your competitors would do to try and win the client's business? Think through what their strategies might be, and consider taking these actions yourself.
- Finding new ways to deliver value. Is there an industry expert whose ideas would be relevant to your client? Can you connect your client to other clients that you have? Could your firm and the client co-develop some intellectual capital (i.e., co-author an article)? Can you invite your client to host or speak at a conference?"

Sobel writes: "You cannot do much about the economy, how your competitors choose to act, or your clients' internal politics. But you can control most aspects of the relationship-building process."

Provide value in new ways

Especially during tough economic times, clients are looking for added value. Time off the clock is always appreciated and often rewarded with larger files, says Heather Suttie, a legal business development and law marketing consultant based in Toronto. That could mean sitting in on a board meeting or annual meeting gratis or offering a half-hour consultation at no charge.

Similarly, don't nickel-and-dime good clients. "I think trusted advisers don't bill for small stuff," Suttie notes.

Consider offering information on your website or speaking at events. For example, Terry Kimpinski, a partner in Saskatoon's Leland Kimpinski LLP, does a lot of work for a commercial real estate office, so he's given free talks to their property managers on common landlord/tenant issues.

While many lawyers are hesitant to give information away for nothing, it's a smart strategy to prove you know your stuff and understand the needs of your clients.

Another way to add value is to connect clients with common business interests or refer them to other trusted professionals. Duane McAfee, a partner in the New Brunswick firm of Barry Spalding, cautions that while the relationship may not always work out, when it does, your matchmaking will be appreciated.

Focus on client service

Not all clients have the background to knowledgably evaluate your legal abilities, but all of them recognize — and prize — good client service.

For starters, make a point of getting back to your clients promptly, even if it's simply to acknowledge you received their voice message or email and will send them a detailed reply by a specific date.

Building Trust is Still Rooted in the Basics

- Add value early in the relationship — ideally in the first few meetings.
- Be human and accessible. Sometimes we are too professional, too buttoned-down, or too flawless.
- Recognize unspoken issues and emotions.
- Be authentic and transparent.
- Answer every question from your client with refreshing honesty and candour.
- Make a recommendation that is clearly in your client's interest and clearly *not* in your own interest.
- Invest time to understand your client better— especially during moments of crisis or high anxiety (e.g. merger, a board

"Responsiveness is absolutely critical," says Suttie. "I hear that time and time again from GCs."

Delivering on what you promise is also crucial, so make sure your promises are realistic, says Paul McLaughlin, a partner in Turning Point Law in Sherwood Park, Alberta and a former practice adviser for the Law Society of Alberta.

Take the example of a job you estimate requires a week to complete. If you promise it in one week

but it takes you ten days because something else crops up, your client no longer counts on you to keep your word. If you promise it two weeks, however, and deliver it in ten days, you've taken the same amount of time but created an entirely different impression.

Finally, make a point of visiting your clients now and then, rather than forcing them to always come to you. "I'll say 'I'll drive out and we'll sign these documents up at your place, and you can give me a quick tour, tell me about your business,'" says Kimpinski. "It might take an extra hour on that first visit, but it tends to really engender a lot of loyalty and respect."

crisis or high anxiety (a merger, a board presentation, etc.).

-Set and review expectations.

— *All For One: 10 Strategies for Building Trusted Client Partnerships* by Andrew Sobel (John Wiley & Sons, 2009)

Put client interests first

Building a trusting relationship can be an uphill battle when society's view of lawyers is less than complimentary. So adopt the Rotary International motto of "service above self," suggests Debra Bruce, president of Houston-based Lawyer-Coach LLC, and show your clients that their interests trump your bank balance.

That might mean finding an alternative to costly court proceedings or – if the client brings forward a matter that falls outside your traditional area of practice – referring him to another lawyer. In some cases, it might mean factoring a client's personal interests into the mix.

Focusing on your client's agenda, not your own, sometimes means that you make a recommendation that is clearly in your client's interest and clearly *not* in your own interest, according to Andrew Sobel. "Breakthrough moments" can provide the occasion to do so; moments that catapult the relationship to a new level. "These can include working through an extraordinarily difficult project or transaction together, dealing with a major crisis, or perhaps, when your client faces a daunting personal issue, providing support and advice," he writes in *All For One*.

Bruce cites the example of a prolonged and emotionally charged corporate breakup she worked on as a business lawyer. When the opposing side finally presented an offer, she recommended her client take it and get on with life, despite the fact that it wasn't entirely fair — and continuing to push for a more equitable agreement would have been to her own advantage.

Instead, she pointed out that legal fees would swallow up most of the gains and that the stress of the negotiations had already put the client in hospital once. The client accepted the deal. "Three months later they called me up and said 'that was the best advice we ever got,'" Bruce says.

Understand your client's agenda ...

You can't be a trusted partner if you don't understand your client's business: how it's structured, what the key challenges are and where the company is headed.

Invest some time off the clock in touring their facilities, going to their new opening or simply asking questions. "Most clients are pretty keen to talk about their business," says McAfee. "By understanding what their business is and where they plan on going with it, you will often be able to generate more work for yourself."

A client with ambitions to expand over the next five years will have different legal needs than one who plans to wind down the business and retire, McAfee notes.

... and the client's business environment

Similarly, you should take steps to increase your knowledge of the industry in which they operate. Has the environment changed over the past five years? What do industry trends mean for the company? How could you help your client to adapt and thrive?

Reading industry blogs and trade magazines or going to conferences will not only provide important insights, it also gives you a common language with your client.

If you've read about new drilling regulations that are going to affect an oil-patch client, mention it in your next conversation with them, suggests McLaughlin.

"What it does is creates a 'we' relationship rather than a 'me/you' relationship," he explains. "You've shown me that you're part of us."

Listen to your clients

One of the most important steps in strengthening client relationships is learning to listen, says Bruce — and paying attention to more than just the words. "Listen for the emotion, listen for the hesitancy, the concern, the fear, the anger, the excitement, the anticipation," she suggests.

In her experience, lawyers often make the mistake of offering a solution before the client has had a chance to fully explain the problem and feel heard.

Is your client excited about what a merger could mean for her company? Worried about what an impending lawsuit could do to her reputation and her bottom line? Ask questions that show you're interested and reflect back what you've heard.

"You're going to trust someone more if you think that they understand who you are and where you're coming from," Bruce points out.

For Kimpinski, it comes down to conveying a sense of caring. "The medical analogy would be a good bedside manner," he says. "That's really what it's all about."

Ask for feedback

In many cases, clients won't tell you when you've let them down or explain how you could serve them better. So from time to time, take the initiative and ask how well you're meeting their needs. While you may feel uncomfortable exposing yourself to potential criticism, you'll gain valuable information and, frequently, more work.

And the simple fact that you ask for feedback raises you in your clients' estimation because so few law firms take the time to ask for their opinion. "You get brownie points, really you do," says Suttie.

To ensure clients are as forthcoming as possible, consider hiring a neutral third party to conduct the survey and report back the results.

Make good on your mistakes

No one is perfect, and that includes lawyers. So if a client isn't happy with your work for any reason, address the issue head on. That could mean making good on something that's gone wrong, suggests Kimpinski, or offering to adjust your fees.

Sobel gives an example of a partner who came clean with a client, informing him of a mistake that his law firm had made in handling a particular case for the company: "It's something that we might not have noticed for a longer time, if at all, but he came to us and told us as soon as they knew about it," Sobel quotes the general counsel as saying. "I trust him *more* now because I know that if there is ever another error or lapse that they will be immediately forthcoming."

In some instances, a client's disappointment may be unfounded. If that's the case, start by acknowledging the client's perception. "Say, 'look, I know you're not happy, but I don't think that's justified, and here's why,'" says Kimpinski. The key is to present your position in a reasonable, non-confrontational way.

Get a little personal

Especially in smaller cities and towns, good relationships are more than strictly business. "Clients in this market are looking for somebody that they can interact with and have a personal relationship with," says McAfee. Indeed, he considers it paramount to a successful practice.

While not every client expects to be wined and dined, connecting outside the office can help build rapport. Clients often feel more comfortable discussing future plans or challenges over lunch or during a round of golf, so make a point of scheduling some social time into your work week.

Focus on the long term

Finally, view your client relationships as long-term investments instead of taking a "what have you done for me lately" attitude.

While we live in a society that expects instant gratification, according to Suttie, relationships are like "great oaks and little acorns" — they cannot be built overnight.

McLaughlin agrees. Becoming a long-term partner means proving that you're worthy of your client's trust — a process that inherently takes time. "I think you earn that by how you conduct yourself," he says. "It's a characteristic that's exhibited in action."

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