

Managing the client connection challenge

Good client management works hand in glove with cultivating a vibrant practice — and requires diligent execution on savvy business development techniques

DONE RIGHT, business development leads to client management. Both are strategic objectives attuned to the long game, and right now, how the long game plays out will depend on actions taken over the last year and in the months to come.

Part of the client connection challenge lies in current and future work arrangements whether a lawyer is in the office, at home or balancing a hybrid situation.

Success will depend on temperament, tools, circumstances, behaviour — both natural and learned — and understanding that, while law is a profession, legal service is a business.

Thriving versus surviving

During the pandemic, some lawyers have been telling me that while working from home they've been enjoying more quality time with clients, prospects and contacts due to the speed and ease of online meetings. Like many of us, they are finding that with the ability to be in the intimate, digital environment of each other's homes, formality has been cast aside in favour of interaction and personal styles more understanding and forgiving of our current circumstances. These are very human, more informal modes of connection.

But what about people at the other end of the connection spectrum? I'm hearing about — not from — lawyers who have been holed up and incommunicado. Their preferred tactic of one-on-one in-person interaction has been locked up due to lockdowns; pandemic-enforced isolation has enabled them to beaver away on files but prevented them from networking in person at events. Not naturally

adept at managing the nuances of business development or client management, they're struggling mightily now and feeling isolated, frightened and worried.

This is a conundrum wrapped in an enigma, but people issues usually are. Thankfully, there are solutions.

Savvy business development

Savvy business development targets clients that sit squarely in the centre of your service-offering wheelhouse and whom you seek to engage in a business relationship. Successful business development is knowing how to nurture the clients and work you want, while gracefully declining work and referring clients best suited to others.

Business development takes thought, planning, patience and diligence, and there is no pat recipe for success. However, I can recommend a few simple tasks that work well for the bashful and time-restricted, as well as those who would prefer a root canal to developing business.

In traditional lawyer six-minute billing parlance, the time to execute these tasks should range from 0.3 to 2.0.

0.3: Review your LinkedIn connections. Invite appropriate clients and contacts to connect with you, and be sure to add a note to your invitation. Remove or unfollow contacts that are well outside your professional sphere.

0.5: Post an article related to your practice or industry expertise on social media networks that your target clients use. You might enhance the post by adding a professional point-of-view comment, and you can

also comment on other's posts or simply "like" them. Be selective and on brand.

1.0: Attend a webinar focused on your target market. Ask questions in the Q&A function.

2.0: Attend a virtual networking event. Send a personal note of greeting to attendees of interest via the chat function during the event or afterward to start a more substantive conversation.

The best part of these activities is that they can take place at home or the office, in pandemic times or not.


Strategic client management

"The customer is always right" is a motto of commerce coined by Harry Gordon Selfridge, founder of the iconic U.K. department store chain that bears his name. And good client management works hand in glove with cultivating a vibrant practice.

Client management is the art of providing sensitively structured service to nurture and protect long-term relationships with key clients that, in addition to being profitable, help burnish your reputation for sterling service and legal work.

Because client management is based on care, it requires the insight and fortitude to bring other providers — legal and otherwise — onto a client's service team. This is when the value of being a connector results in wins for the client, your colleagues and you.

Trusted advisor

"Trusted advisor" isn't a moniker. It's the hallmark of those who consistently earn their excellent reputation and remain highly influential. They achieve recognition through savvy business development combined with strategic client management. And they embrace — as should you — one of the most important tenets of the long game: "No one is you and that is your power." 

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