

## 6 Tips on How to Stay Connected and What to Say

By [Silvia L. Coulter](#) on March 23, 2020

There have been some good blogs and newsletters written about staying connected to clients and good contacts. Some of our clients and contacts are asking, "This is all helpful but I don't know what to say." So here are some scripts for getting in touch, keeping in touch, and following up on next steps for now and beyond COVID-19.

### Tips:

- Be confident and clear with your message. Know your goal for the call or meeting ahead of time. Focus on building or strengthening the relationship.
- Make sure there is a follow up step and it's in your court. Add it to your calendar so you'll remember to call/schedule meeting or whatever else was decided.
- Remember that staying connected will lead to business in the future and that people like to hear from you—it shows you are thinking of them and the inherent message is that they matter.

**Below are some helpful scripts when calling or meeting with people for now and in the future:**

***1) For inactive clients/contacts with whom you have not spoken in a few or more years. (The objective is to rebuild the relationship and not discuss BD right away). Now is a good time to check in with people!***

It's been a while since we connected and I wanted to touch base to say hello and hear how things are going. [Pause and let them answer or leave this as a message for them to return call]. I would welcome the opportunity to schedule a time to talk with you to hear what's going on with you, your business, etc. OR (post C-19) I would welcome the opportunity to schedule a time to meet—I'd be happy to come over to your office. Let's look at calendars and figure out a good time. Remember, you are back at the beginning stages of the sales cycle—Assess Needs!

***2) For existing clients and contacts during the Covid-19:***

I'm calling/emailing to check in and see how you and your family are doing. These are challenging times for us all. Please let me know how you are doing. If there is anything at all we may assist with, please let me know that too. We want to underscore our clients are very important to us and we are here to help in any way with the legal aspects of your business decisions or just to use this work from home time to hold a virtual CLE or anything else we may provide

***3) For clients with whom you have completed some work but no long-term, ongoing relationship yet.***

I've enjoyed working with you/getting to know you [whichever is most appropriate] and would welcome your thoughts and advice on how to continue to build a relationship with COMPANY for potential opportunities to work together. [Then let him/her answer and go from there]

**4) For referral sources/potential referral sources who have existing counsel relationships.**

We know COMPANY has good options when it comes to referring work to counsel. I'm very interested in hearing from you, what you think our next step should be to continue to strengthen our relationship with COMPANY. [Listen to how he/she responds and think of a next question that leads him/her closer to suggesting a next step for you to take for building the relationship which could include meeting more of the team from COMPANY at their location or at the firm.]5) For connecting with your existing contacts who will introduce you to someone else in their organization.

Two parts to this one: Who else in the company do you recommend I meet to continue to build our relationship with XYZ Company. How should I go about meeting him/her?

To follow up on that: NAME, you've been great to offer to introduce me to XXX. I'm calling to follow up on your recommendation about next steps.

Tip: When you leave a meeting or call, try to make sure you have an action step. If your contact says they will call you to follow up, be sure to respond by letting them know if you don't hear from them by a specific date (e.g., if I don't hear from you by XXX, I'll give you a call)

To approach someone in a different way, you may also want to say, "I appreciate the opportunity to work with you and would welcome your advice about something." "As I continue to build my practice, are there one or two people in your network who you think I should meet?" Sometimes people are not in a position to give you business but are in a position to introduce you to others.

**5. For turning friends/neighbors into potential business opportunities.**

At a social outing or neighborhood meeting, you might say: "Cynthia, I'm going to give you a call at your office next week to find out more about your business and to discuss ways in which we might have opportunities to work together."

You may say once you do have a meeting: "Our friendship is of utmost importance to me and I don't want to jeopardize that. At the same time, it seems that we could pursue opportunities for working together." Do you agree?

**6. For following up with individuals who say they will send you a deal/piece of work in the future.**

It was good to see you/speak with you. Thank you for offering to send me an upcoming deal/piece of litigation/project. I will give you a call in the next few weeks to follow up on what my next steps should be. I look forward to the opportunity to work with you and your team.

As always, please feel free to call us if you want to brainstorm to prepare for a call or meeting or how to best follow up. We also like to hear good news about how your calls and meetings went!