

## Building Long-Lasting Client Relationships

By [Silvia L. Coulter](#) on January 31, 2024

Driving client engagement is important. With demand for services remaining almost flat, firms are grabbing share of wallet from one another. Not sure what to ask clients? How to build long-lasting trusted advisor relationships? First, let's take a look at the stages of relationships law firms have with clients.

Study after study among law firm industry clients shows that, for the most part, they are ambivalent about their outside counsel. That's not to say they don't like the relationship lawyer(s); it's more to say that given a solid value proposition for changing counsel, some would make the switch.

There is some need-to-know information to ensure the firm is retaining and growing long-lasting relationships with clients. If relationship partners don't have the answers to these questions, then it's time to get them packing to go visit clients, add value, and build revenue growth opportunities. Clients not only expect these proactive visits (preferably in person but, at the very least, virtually), they will slowly distribute work to those firms that show they care.

There are two sets of helpful questions to make quick – but significant and necessary – work of advancing this aim. The purpose of the first set of questions is to proactively plan with the client by meeting once or twice a year. This alone will, by far, set a firm apart from its competitors. And, based on the responses, it allows the lawyers to anticipate related legal needs. 'Legal planning' is how we describe this. We all know these check-ins with clients are important. Make it a strategic priority of the firm and have partners report back on results.

### Client Retention and Growth Questions (especially important for client team planning)

- Please describe the company's goals and objectives for the next 12 months.
- What are the company's top three priorities this year?
- What potential challenges does the company face?
- Where do you see the business going in one, three, or five years?
- What growth opportunities do you foresee in the future?
- What are the greatest challenges you are facing in the legal department?
- What's currently working in the legal department? What's not?
- What are the best ways in which outside counsel may help you achieve your goals?

### Client Service Interview Questions

#### Value

- How do you determine value received relative to professional fees?
- Regarding value, how does our firm compare to other similar law firms?
- As you consider all your service providers, what separates one from another?
- How do you manage your legal costs in terms of overall fees? Hours, rates, etc.

- Can you think of any services that we might offer that we don't offer currently?
- What changes, if any, would you suggest?

## Outstanding Service

- When you think of "outstanding client service," what comes to mind?
- How would you describe "quality service?"
- What should we stop/start/continue doing?
- What else can we do to make your efforts more successful?

## Understanding Your Business

- What does "understand my business" mean to you? How would you evaluate our understanding of your business?
- What level of understanding do you expect from your outside counsel?
- Can you suggest ways for us to better understand your business?
- Over the next year, what changes or challenges may impact your business and what you want or need from us?
- Are there any other business needs that we might address for you?

## Relationship

- How would you describe the relationship with our firm?
- In your relationship with our firm, what specifically impressed or disappointed you?
- What are the most important elements of a professional relationship to you?
- In general, what characteristics do you value regarding the attorneys on our team?
- In what specific areas could we improve?
- How likely are you to recommend our firm to others?

To protect the firm's client base, begin to incorporate client retention and growth plans into the firm's strategy and discuss these strategic initiatives and progress at quarterly firm meetings. Invite clients to spread the word and provide additional thought leadership.

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