

Closing Business: First Understand the Four Stages of a Business Relationship

By [Jim Cranston](#) on August 14, 2014

Just knowing people isn't enough in today's competitive legal market. I often hear from clients, "she'll definitely call me if she ever has a legal need" or "I play golf with him every week, he will certainly call me if he needs help." That may have been the case ten years ago, but not today. Assuming that a client or friend will know to pick up the phone and call you when a need arises is wishful thinking.

So what can you do? Start by understanding the stage of your relationship with a contact. There are four basic stages:

1. **Awareness:** Meeting people, getting them interested in knowing you better and/or working with you. Establish common interests.
2. **Exploration:** This is what shifts someone from being an acquaintance to a potential client. Stimulate with value propositions.
3. **Expansion:** Using a variety of techniques to maintain contact and appear on the potential client's radar screen. Use value propositions to provide a forum for needs assessment.
4. **Commitment:** Does it make sense to do business together? Introduce unique differentiators and propose.

In the **Awareness** stage, the likelihood of getting hired is very remote. Finding ways to continue to reach out to build on the initial relationship is critical. Examples include sending articles of interest or following what is going on with their business and reaching out to comment are two good ways of moving toward the exploration stage. When moving the relationship into the **Exploration** stage, a common avenue for getting there is a value proposition. Perhaps a firm seminar, client alert, CLE program or simply an article on a business issue or topic that has a legal connection to get firmly in the exploration stage. Next, getting to the **Expansion** stage usually involves a face to face meeting on a legal need or area of interest to your contact. In the meeting, ask good needs assessment questions to diagnose the issue or matter to ensure that you're in the expansion stage. The **Commitment** stage suggests that the prospective client has a need and you and/or your firm can help. In the commitment stage it's wise to begin asking closing questions. Questions like "is this an area you might need help with?" or "would you be interested in a few ideas/strategies regarding this issue?"