

Law Firm Sales: Engaging with Clients to Drive Revenue

By [Silvia L. Coulter](#) on December 16, 2020

This post originally appeared September 14, 2020 in PinHawk's [Law Firm Marketing Brief](#).

No matter which time of year you choose to conduct a client meeting, it will be welcomed by clients. And, it helps energize members of the firm when they have good meetings with clients. These obviously are not meetings for which you charge a fee, but rather meetings which focus on the relationship with the client or contact. Whether it's the beginning of a new year to review the last year's activities, or the end of a year or mid-year to check-in, consider scheduling meetings, virtual or live (but not by phone—the point is to “meet” with the client) to discuss one and/or all of the following:

- **Year-End Review** (an update or recap of important matters worked on during the year)
- **A Client Service Interview** (formal or informal client satisfaction and service commitment review)
- **Annual Planning Session** (discuss business plans, initiatives, and aspirations for the upcoming year)

This proactive approach achieves the “top of mind” mindshare that we seek and also affords us the ability to be viewed as a trusted business advisor.

Client Service questions to consider (and you will want to come up with your own for each client or contact relationship):

- How would you describe the relationship with us?
- What would you consider the essential elements of a professional relationship?
- In which specific areas could we improve?
- How would you describe the quality of our work?
- Regarding value, how do we compare to other law firms?
- Would you suggest any changes?

Upcoming year planning questions to consider:

- What are your top three priorities this year?
- Can you describe your goals and objectives for the coming year?
- What potential challenges does the company face?
- Where do you see the business going in 1, 3, or 5 years?
- What are the critical company initiatives for the upcoming year?
- What growth opportunities do you foresee in the future?
- What are the most significant challenges you are facing in the legal department?
- What is currently working in the legal department? What is not?

- How do you see using outside counsel to help you achieve your goals?
- What criteria are used for selecting outside counsel?
- What areas provide the greatest opportunities for improvement?
- As you think about your outside law firms, are there future projects for which you would consider working with our firm?

Always close with a recap of the meeting and next steps based upon your understanding of the client's needs. Schedule a time to follow up (including dates and times).