

Law Firm Sales: Relationship Partners Are Wise To Check In

By [Silvia L. Coulter](#) on April 25, 2018

I feel compelled to write this post about the importance of the relationship partner paying attention to the client relationship. In the past twelve months, I've worked with six lawyers who have lost clients worth \$2 million/year to \$10 million/year. How does this happen? These are important clients to them and to their firms. In each instance I've called the clients to find out what the heck happened from their perspective and to help the firm learn how to never let this happen again. In each case here was the feedback. "Check in with us on a regular basis. Ask us how your partners and associates are doing. We communicate with them so check in with the firm's team servicing us as well." Seriously? It's that simple and that complicated? Yes.

It's important to assign work to others in order to grow the pie, especially if one is a rainmaker. It's also critical to assign work to women and diverse lawyers. Don't stop there though. Clients communicate with these individuals about good news, bad news, preferences, goals, and other relevant information. Clients **assume** (and rightly so) their information is being shared across the group of lawyers who support the company. The issue is information is often not being shared across the service team—working timekeepers don't always like to share negative news or anything but stellar feedback they've received. This creates a big gap between the firm and its important clients. The opportunity to build a strong relationship with important clients is this simple – communicate with them. Ask how the team is doing, ask for any specific feedback about associates (this information could be useful when deciding who to move forward in the firm as well), hold a monthly meeting/call with everyone who is working with the client to discuss any client input or feedback. One more opportunity exists, and that is the opportunity to grow the amount of work from the client.

The members of the firm's legal team are the eyes and ears of the firm. Teaching them to learn more about the clients' goals, growth strategies, and other needs, is the responsibility of the client relationship partner with some help from the business development team. Training the team to listen to the client and listen for new opportunities can bring the team and thus the firm closer to the client and become more of a trusted advisor.

Follow these simple steps to retain important clients and to earn the highest levels of trust from those clients:

1. Make sure the client knows everyone on the legal team whose names may appear on the bills and/or with whom the client speaks or emails. If there will be a change to the team, call the client beforehand and let them know.
2. Ask the firm's legal team to meet once a month (mandatory) to provide any updates about the client and to discuss what new news they have learned from the client (including visiting the client web site so they stay aware).
3. Ask the client quarterly for input about the firm's team. It's important to seek client input as it genuinely helps to build strong relationships.

Most clients report to us that these activities are not often followed by outside counsel and are best practices that bear fruit.

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