

Say What?! Topics to Keep Conversations with Clients Moving Forward

By [Steven M. Bell](#) on June 29, 2020

By now, your firm and its lawyers have decided whether or not it is appropriate to reach out to clients and prospective clients for business development purposes. For those who have decided that outreach is in order, decisions also have been made about whether the best channel for doing so is phone, e-mail, virtual conferences, USPS mail or some combination of these.

For those who have determined to, and how to, reach out, the next problem is what to say.

There are limits to how often one can point to the challenges we face, the notion that we're all in this together, and the sincerity of our willingness to help. And I have discovered in my own outreach efforts that folks trying to do business will countenance only so much conversation about personal or family topics. So, in order to maintain a productive dialogue with clients and prospective clients, a bit more digging is in order.

To me, now is a perfect time to turn to the professional business research and analysts at your firm. (Of course, if your firm does not offer these resources, it is not all that difficult for business-savvy lawyers or marketers to do themselves).

I'd recommend, for starters, finding the most recent publicly available documents (such as 10-Ks). Be on the lookout especially for the company's opportunities (usually found in the strategy section of public documents) and the challenges (which can be found not only management's discussion, but also in the company's list of risks).

Next, it could be very productive to focus on how your client's (or prospective client's) competitors are doing. Identifying the competition is as simple as entering the words "X Corporation Competitors" in the Google search bar. As a corollary, skim through a few recent issues of relevant industry or trade publications to get a handle on hot topics your client (or prospective client) and its peers are facing.

Other outreach topics can be found by studying the news and social media feeds both of the company as a whole and of the individual(s) you are pursuing.

Finally, don't forget to look around your firm for examples of successful solutions that your lawyer colleagues have developed and which can be applied to your own clients or prospective clients.

With this information in hand, you can move from the realm of uniformed questions (e.g. "How are things going?" or "What are your plans?") to a much richer list of inquiries, such as:

I know that your company was planning to expand in the AI vertical? Tell me about the progress you have made.

*I know that you have been vitally concerned about supply chain arrangements to replace those in China? I read in **Industry Rag** that several in your industry are moving production to Central America. To what extent is your company also moving in this direction?*

We have another client that was able to reduce its global tax rate by using an innovative strategy involving transactions in Europe and southern Asia. You are in a different line of business, but some of the facts and circumstances are remarkably similar. May we discuss this with you?

Research and analysis provide the fuel to make client conversations relevant, productive, in motion, and adding value...with or without a global pandemic and social equity movements. If you haven't yet made fast friends with the professionals in your firm's business research and analysis department, there is no time like the present. Followed, of course, by vigorous outreach to clients and prospects.