Turn One-Off Calls into Long-Term Client Relationships

By LawVision on August 22, 2013

Recently a client of mine called with a not-uncommon problem. The conversation went something like this.

> I have several clients who call me regularly with one-off questions or projects that require a quick phone call to remove a roadblock. My advice and connections have saved them a great deal of money, and I am happy they view me as a trusted resource, but I rarely get larger engagements from them – that work is going to other firms. When those firms fail or get in a bind, I'm called in to save the day. I get a half hour of billable time, and the other firms continue with the larger engagement. These calls really frustrate me. I am not being paid what my advice is worth, and I'm losing work to competitors!

My client's initial reaction was to call her clients and tell them "no more save-the-day one-off assignments until I get more long term-business!" Once she calmed down a bit, she agreed that an ultimatum would probably not be very effective and that receiving such calls is actually an indication her clients trust her expertise. Instead, she began to realize that the problem was her lack of proactivity.

My advice: if you are tired of getting one-off calls for advice, then quit waiting around for the calls and do something about it.

This is the plan we created together for her. Use it with your clients who annoy you with similar one-off calls.

1. Ask for a meeting.
2. The stated (and actual) purpose of the meeting is to understand the client's business better so you can better serve them.
3. Make sure the right people (general counsel, CFO, CEO, working contacts, etc.) are in the room.
4. Ask questions to uncover long-term needs and pain the client may be experiencing. Seek out long-term systemic or current critical issues that must be resolved.
5. As a part of exploring long-term problems, point out how the one-off calls may be an indication of a larger structural problem in the way they assign work. Present the problem in terms of how it is adversely affecting **their** bottom line, not yours.
6. After getting a better understanding of current problems or issues, suggest ways you can work with the client in a more regular way to solve problems.
7. Try to avoid concluding the meeting with "Please contact me next time you have a larger matter we can work on together." That shifts the burden of finding a matter back to the client and relinquishes your control over the process. Instead, keep a dialogue going to help them identify the right matters for you and your firm.

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