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Technology & Management

Effective Encounters

Positive Client Meetings Build Strong, Lasting Relationships

Some people believe success is based on what you know. Some believe it is based on who you know. Still others believe it depends on what you know about who you know.

No matter which theory you believe, your own success is based, in large part, on your relationships with others, specifically your clients.

Whether you are a solo practitioner or an attorney at a 500-plus law firm, if you want to succeed professionally, you have to bring in business. Most attorneys are quite competent. Many are excellent. As a matter of fact, so many lawyers are excellent that you cannot rely solely on your legal skills to get business.

The fundamental difference between rainmakers and everyone else is that rainmakers — be they lead partners, promising new partners, or the up-and-coming associates — know how to help clients feel comfortable. Most of the substantive work a rainmaker brings into a firm is usually done by a tax specialist, a real estate expert and teams of litigators or transactional attorneys. But the rainmakers get the credit because they know how to connect with clients.

The easiest way to bring business into the firm is to get more business from your current clients. You gain and keep clients by building relationships. While most client contact is over the phone, the real relationship-building takes place face-to-face.

Since you get precious little face-time with a client, you must use every minute of it to build a relationship rather than push your own information. Law school taught you how to strategize a legal argument. Law practice taught you how to strategize your legal documents. Now you have to strategize your client meetings.

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Before sitting down with a client, you want to accomplish two things. First, consider your communication weaknesses and the client's communication needs. Second, put yourself in the proper frame of mind. Remember, the meeting is not about you and your "stuff."

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It is about the client and meeting the client's needs.

Before meeting with a client, think about your tendencies as a communicator. Are you too abrupt? Do you tend to get sidetracked? Do you give far too much detail? Do you take forever to get to the point?

Whatever your particular weakness — and we all have at least one — remind yourself about it as you strategize how you will run the meeting.

If you are overbearing, reign it in. Ask more questions. Any assumptions you may have made before the meeting about the client's concerns may be completely off-base.

If you know you go off on tangents, prepare notes carefully and use them to stay on track. Resist the urge to tell too many anecdotes. Respect the client's time constraints.

If you tend to provide a "data dump,"reduce your explanations to simple statements and ask, "Would more information be helpful?" If your client says, "No. I get it," go on to the next point. Just because you have the information does not mean they want or need it.

If you tend to hesitate before taking a stand, preface your opinion by explaining that the question is a complex one requiring some thought, or possibly some research. If you do not preface your answer, and simply pause or waffle in your response, you may appear unsure of yourself, and that can be fatal.

Right Mindset

Consider the purpose of the meeting. What do you want to accomplish? Perhaps the ostensible purpose of the meeting is to share with a client the status of a litigation matter or the latest offer from a merger prospect. If you return to your office after the meeting having accomplished only that narrow objective, you will have missed a prime opportunity.

Instead, your main objective should always be to learn. Learn about the client's concerns. What about this deal keeps her up late at night? How will this litigation impact the client's overall situation — for both the corporate client and the individual with whom you have contact? Why does she keep asking about a certain aspect of the matter that you consider unimportant?

Because you are the expert and deal with these matters regularly, you may assume certain facts about the way the client views the matter. Assume nothing. Ask about and confirm everything.

Your level of success should not be measured by what you said during the meeting, as much as by what you heard. You should leave the meeting with a new understanding of how to service the client and ideas about what additional legal services the client may need. That is the objective for every client meeting.

Meeting Strategy

You will feel much more confident at a client meeting if you have a plan. An effective meeting strategy keeps the focus on the client, even at the sacrifice of your material.

Step 1: Set the tone.

Your demeanor during the meeting is crucial. You should look happy about meeting with your client. Even if the matter at hand is not a pleasant one, you should look pleased at the opportunity to help. Keep in mind that no one wants to meet with his or her lawyer. The phrase, "Hey, let's call the lawyers!" is rarely said with enthusiasm.

Generally, when people meet with their lawyer they are not doing their primary function, which is to meet some bona fide business objective. You are the only person at the meeting who is going to bring anypositive energy to the room. At the very least, you must smile. No one wants to meet with someone who looks as if their dog just died.

Keep in mind, there are many terrific firms out there. The client can get great legal services at any of them. They need to want to deal with you. Make the meeting pleasant.

Whatever exchange of pleasantries takes place at the beginning of the meeting, allow it to continue at the discretion of the client. Some clients need a lot of chit-chat to feel comfortable. Others want to get right to business. Always open the door to a little banter, but take your cues from the client.

Step 2: Confirm the purpose of the meeting.

You and the client are both busy people. The meeting may have been scheduled two weeks earlier, probably between your secretary and your client's. Once you are ready to get down to business, you should state as clearly as possible why you are meeting.

Begin by saying, "I appreciate you taking the time to meet with me to review the terms of the contract" (or "to review the plaintiff's latest settlement offer" or "to discuss your concerns with the firm's fee statement last month"). Gauge the client's response. Does he seem a bit puzzled by your statement? If so, ask if your assumption was correct. You do not want to talk for 20 minutes only to have the client say, "Well that is all very interesting, but I thought we were going to discuss the Acme deal, not the Smith litigation."

Step 3: Gather current information.

Once you confirm the purpose of the meeting with the client, the very next words out of your mouth should be, "Before we get into that ..."

You should then follow with an open-ended question, such as "What is your greatest concern with the merger?" or "How are things under the new CEO?" or "How is the litigation affecting your employees?" You may know what his greatest concern with the merger should be, but you will not know his actual worries unless you ask.

By asking questions before you start discussing the issues, you communicate that although you have some very specific items you would like to talk about, you are willing to scrap your entire agenda to talk about whatever concerns the client.

Whether or not you ask open questions at this point in the meeting will determine whether the meeting is a true success. It takes a brave person to be willing to derail a meeting by opening the conversation to the unknown. But if you do, you may hear things you never expected.

Step 4: Discuss your information.

If the client indicates there are no other issues and clearly wants to talk about the specific purpose of the meeting, get to it.

If the meeting gets sidetracked with other issues, you must determine whether there is an issue that you must resolve before leaving the client's office that day, or whether everything you came in to discuss can wait until the next meeting.

If the purpose of the meeting is to review a specific document, whether it is a draft of a brief or the most recent version of a contract, clearly mark those items you need to discuss. Put tabs on the pages to keep the client from wandering through the document. Highlight the specific language on the page to draw his attention.

After reading through the language you want to discuss, draw the client's attention back to you so that you are having a conversation rather than each of you meeting with a document. Preface your analysis with language that will help get the client out of the document, such as, "Let me explain why we chose that language." Move through your points sequentially, letting the client know all along where you are headed.

Step 5: Establish action steps.

At the end of the meeting, clear action steps are needed, and most of the time, you must take the next one. Almost always, however, the client has certain duties to perform as well.

"So, I will revise the contract to incorporate the items we discussed. I will get it to you by Wednesday. You will have to review it immediately and get back to me by close of business Thursday so that I can send it to the other party Friday morning. This way we can close by the first of the month."

If your action items are not clear as to who does what by when, then nothing will happen.

Post-Meeting

After the meeting, immediately flesh out the notes you took regarding the client's concerns.

No matter how good you think your memory is, you will forget many of the subtleties of the discussion. If you do not take a few minutes to focus on what just transpired, you may be distracted and forget important nuances of the meeting, and will not be able to service your client the way you should.

Of course, you must now follow up according to the action steps you laid out. Any e-mails and voicemails should be short and to the point.

Conclusion

If you want to serve your clients well and build lasting relationships, make sure when you are speaking with them that you keep the focus on their needs.

The first step to becoming a rainmaker is to develop further the relationships you already have. The best way to accomplish that is in person — at a meeting or over lunch.

Face-to-face meetings have far more impact that a series of phone calls. If you do not normally meet with clients in person, start. It is time.