



THE NEW ELLIS GROUP

Monday Monday

Connecting the Dots with Karen Kaplowitz



*Helping you create and reinforce the habits of successful career building,
gleaned from my work as a business development strategist, trainer and coach*

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Charity Begins...At Work. Are you responding appropriately when called on by clients to support charitable or community activities in which they or their companies are involved? If you treat invitations from clients to honor them or their companies or to support a charity as annoying, burdensome obligations, or ignore them altogether, you may not only miss the opportunity to deepen the relationship but also cause damage. Here are some questions to consider:

- How important is the client relationship?
- Did someone who controls the flow of work extend the invitation?
- Did the client convey its expectations on the level of your support? If not, can you ask?
- Did the client give you advance notice that such requests were part of the relationship?
- Can you use the event to meet client leaders or to introduce firm leaders or other practice groups to the client?
- What are your competitors doing?
- Can you use the event to entertain other clients or to meet other potential clients?

Whatever you conclude, act on invitations from clients quickly, out of respect to the client and also to maximize the opportunity to use the occasion strategically. If you are going to an event, invite some clients to join you. They will not always have a seat at the company's table.

Example: When your client informed you that your firm had been selected to be a preferred provider, she told you to expect that they would occasionally call on your firm to support organizations with whom the company was engaged. When you notified firm management that your firm had been selected as a preferred provider, you made a point of reporting on the client's expectations and suggested that the firm create a reserve for charitable activities relating to the company.

When you received an invitation to support a group honoring the Chief Legal Officer, you submitted it to the firm management, explaining that the invitation came within the scope of the reserve you had set up for charitable activities relating to this client. You recommended that the firm only use a portion of the reserve to prepare for the possibility there would be other requests. Are you committed to following each of your business development initiatives through to a conclusion in a results-oriented and cost-effective way?

As soon as you received the invitation, you also alerted the key lawyers on your own team to calendar the event and reached out to your key contacts at the client to invite them to be your guests.

If you have found clients' charitable requests to be a burden or have had to struggle to get firm approval of charitable donations for client-related activities in the past, can you plan for next year in a way that anticipates the contributions for which you are likely to be tapped?