



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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Introducing Clients to One Another

Lawyers are constantly on the lookout for opportunities to introduce lawyers from other practice groups or offices to their clients in hopes of expanding the scope of their clients' work with the firm. The client relationship partners are often responding to pressure from other lawyers in the firm for access to their clients. Some clients are gracious about such meetings even when they see them as for the benefit of the firm, not themselves. Are you paying as much attention to introducing your clients to people who could benefit *them*? Do you have your antennas out for situations in which you can introduce your clients to other clients instead of other firm lawyers? Here are some questions to help trigger introductions your clients might really appreciate:

- Is your client considering a career move? If so, do you have other clients who could be helpful?
- Is your client facing challenging political issues within his or her organization? Do you have other clients who have dealt with similar issues who might share their perspective?
- Is your client interested in more visibility in the business community? Do you have other clients who are leaders in business, community or charitable groups that could be helpful?
- Does your client play a sport which could be the basis of introductions — golf, cycling, tennis?
- Is your client involved with a charity for which they would like introductions to other leaders?
- Do you have clients who might be interested in doing business with one another?

Your clients will appreciate your paying attention to what is happening in their careers, their businesses, and their lives and your offering to make introductions that would be helpful to them. If your suggestions about introductions are primarily for their benefit, they may also be more receptive to your requests to make occasional introductions to other lawyers in your firm.

Example: The client relationship partner paid close attention when a client's general counsel shared with him that she was starting to think about the next phase of her career because her CEO was considering retirement. The general counsel said that she understood that a new CEO might install a new leadership team including a new general counsel. The general counsel said that she would appreciate the partner's keeping her in mind for other opportunities including general counsel roles and boards of directors. The partner agreed to be on the lookout for other opportunities. The partner also offered to make some introductions through other partners in the firm to some prominent business and civic leaders in the community who could be helpful to the general counsel. The partner then discretely shared the situation with some partners and asked for their help. One partner who was on the board of a charity asked if she could recruit the general counsel to join the board or to be an honoree at one of their charity functions. Another partner offered to introduce the general counsel to a client who was a leader of the local chapter of a major organization of in-house lawyers. The general counsel was grateful for these introductions which helped her prepare for the possibility that she would be on the job market when her CEO retired.

Are you so focused on your interest in introducing clients to other firm lawyers that you are missing more organic opportunities to make introductions for your clients' own benefit to other clients?