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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Being Visible to Clients and Prospective Clients in a Virtual World

Being visible to clients and prospective clients is still essential for sustaining and building relationships and attracting new business. Of course, many of our old tools which relied on in-person meetings to reinforce relationships are not available or much less available. But many strategies for maintaining connections to clients are readily available. Here are some tried and true strategies to consider:

- Send out client alerts with personal notes to clients that state why you thought the alert was relevant to them and inviting them to give you a call. Do not just inundate clients with every mailing your firm distributes.
- Pay attention to how your clients' and contacts' businesses are being impacted by the pandemic. Be sure to track your clients' and contacts' businesses, through Google alerts or other tools. If you see they are having problems, reach out to see if you can be of help.
- In all your communications, whether in text or live by phone or video, be sure to convey your concern. Your messages might include "I've been thinking about you" or you might ask "Do you have everything you need?"
- Pay attention to your contacts' own job security and offer to help them personally if they are affected by changes in their businesses.
- Try to look for any opportunity to support your clients even if their needs do not relate directly to legal services. Are they looking for investors, financing, acquisitions? Are their children looking for jobs or career advice?
- If you see legal activity, such as a new lawsuit, do not swoop in to offer to represent the client but do offer relevant information. For example, if you have litigated against the same lawyers involved in the new suit, offer to share information on them.
- Be prepared to take advantage of every client contact you have. Before a scheduled phone call or meeting, spend non-billable time getting up to speed on the client. Look at their websites, recent 10Ks, and news so you can ask relevant questions.   You may not have much time for such conversations, so you need to have planned ahead.
- Be on the alert for any major change in circumstance that might suggest that one of your prospective clients would be open to new lawyers. For example, has one of your prospect's key lawyers retired or moved to a new firm? Stay tuned for situations in which clients might be up for grabs.
- Look for opportunities to introduce clients and contacts to one another. If one of your clients is facing an issue that another client has recently resolved, ask the first client if they would talk to the other person. The first thing they will do is talk about you and the regard they have for you.

All these strategies have one thing in common: they are client centric. Your opportunities to meet in person with clients and contacts for breakfast, lunch, drinks, dinner or at meetings of organizations to which you belong will be far more limited. Video calls and conferences on Zoom or other platforms may help but it is important to connect and stay top of mind in new ways that show your interest and concern for clients and contacts. Stay well and safe!

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