



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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Are Your Client Relationships Sustainable?

The pandemic initially helped reinforce many existing attorney-client relationships. Faced with the significant challenges of working remotely, many clients bonded more closely with incumbent lawyers and law firms. Familiarity during chaos helped solidify existing relationships. But the pandemic has also resulted in many forces which open the door to more competition. There is less advantage to proximity – think golf and lunch – when everyone is working remotely. Some lawyers have observed that their clients are relying on younger, tech-savvy leaders which is accelerating retirements among their long-term clients. If you have clients who are retiring, or nearing retirement, here are some questions to help you evaluate whether you have sustainable client relationships:

- How many of your key client relationships depend on your close personal relationship with a senior person at the company?
- Have you asked key clients whether the pandemic has affected their own timetables for retirement?
- If your key contact retired or left the company, do you know who in the organization is likely to be tapped as his or her successor? Have you kept up with the current roster and organizational structure of the client's law department and executive leadership?
- During the pandemic, what changes have clients made in assigning responsibility in their organizations for work in your arena? Are you keeping track consistently of those changes?
- How has the pandemic affected the way your clients engage with their own customers and business partners, including their law firms? Has your firm adapted to follow suit?

For additional ideas on preparing for clients who may retire, see [Before Clients Retire or Move On](#).

Example: A partner used to make a point of meeting in person with key clients at least twice a year to get feedback on the firm's work and to keep up with major relationships. When the pandemic disrupted those plans, the partner instead organized periodic Zoom calls to touch base with clients. The partner was relieved to hear that one client, who had considered retirement before the pandemic, was postponing her plans to retire because working remotely and not traveling had eased the burden on her. Another client shared that after losing some family members to Covid, that he was planning to retire in 18 months. The partner offered to help the client prepare for the transition. Since the client had been with the company for decades, the company would be losing a lot of institutional knowledge particularly on M&A deals. The partner asked if it would be helpful for the firm to compile a data base and form file that new people could use. The client welcomed the suggestion and recommended that the firm work on organizing the project with the client's most likely successor. The partner tapped the firm's knowledge management group to organize a digital data base and form file. The project gave the partner the opportunity to work closely with the client's likely successor. When the project was complete, the firm did a presentation to the client's law department and leadership team which reinforced the long relationship between the firm and the company.

If you are looking for ways to insure the sustainability of your key client relationships, then your top initiative should be to create more institutional ties that will survive the retirement of the leaders with whom you have enjoyed close, personal relationships.