



# 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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## The Question for the Last Quarter: Who Needs You?

While relishing the last weeks of summer, it is a great time to get organized for the last quarter of the year. If you have fallen short year to date on your business development goals and you are looking for high value actions to finish the year with a flourish, the question to ask is who needs you? Here are some ways to assess whether you are fishing in the right pond for new work and new clients:

- Identify existing clients where you believe there may be opportunities to expand the business you do with them.
- Schedule a check-in with those clients and ask them directly what problems they are trying to solve and how you can help them better. Include a comparison of actual versus expected fees on current matters. What do they need from you to achieve their year-end goals? Do they anticipate any changes in personnel that you should be aware of?
- Review the type of work you have done this year. If the nature of the work has shifted, have you adapted? Do you need interdisciplinary collaborations with other practice groups or other offices or other firms? Do you need to recruit talent with new skills? Are you clinging to old goals while your competitors are planning for next year's challenges?
- Identify any of your former clients who have new jobs or new roles. Can you help them in their transitions? Do they need help from someone else in your firm?
- If you did not get work you expected from certain clients, have you asked them why so you can make necessary adjustments, whether to the team, your rates or fee arrangements?

There is always a flurry of business development activity after Labor Day. With more people returning to their offices and resuming in-person meetings and travel, this Fall will be even more intense. Before you set out to catch up with everyone on your list of clients and prospects, it is worth taking the time to be strategic and figure out who on that list really needs you.

**Example:** When the Supreme Court's draft *Dobbs Ferry* opinion was leaked in the Spring, one law firm quickly mobilized a team of lawyers across practice groups to address the issues they expected clients to face. The team included lawyers with expertise on ERISA, health insurance, data privacy, workforce management, government investigations, compliance, and prosecutions. The firm's taskforce organized a resource center on its website including client checklists and information. They then started conducting webinars and facilitating clients' connecting to the right lawyers to address their issues.

The firm's taskforce focused initially on the most pressing issues such as the ability of clients to pay for employees to travel out of restrictive states to obtain abortions. The firm expanded the scope of its work when major companies like Eli Lilly and Cummins stated publicly after Indiana enacted abortion bans in August, that they would consider avoiding states that restricted reproductive healthcare in deciding where to build new facilities. Real estate lawyers who specialize in economic development and incentives then joined the firm's taskforce. The firm's clients were grateful to have a one-stop shop to address urgent new legal and compliance issues created by the Supreme Court's overturning *Roe v. Wade*.

As you prepare to reckon in the last quarter with year-end evaluations and compensation decisions, are you paying close attention to what your clients need and how well you are meeting those needs? Enjoy the final weeks of summer.