

# Check Your Client Development IQ

By Tim W. Hrastar



Maintaining current client relationships, and developing new ones, ensures your income for today and tomorrow. In the rush of handling client matters it's easy to neglect your client development and relationship management activities. The following are fifteen questions to check how well you are doing on your client development and relationship management activities. You should be able to come up with positive answers to these questions. After each question I have made a comment to give you hints on what to do. Refer to this handy checklist every couple of months to track your progress.

## Questions to Ask Yourself

1. *Generally, what have you been doing for client development in the past couple of years?* Now is the time to let your mind wander as you think about your marketing successes. What are the positive things you've done to acquire and keep clients?
2. *Do you keep up with clients via telephone, email, or in-person meetings, in-between matters?* Keeping in touch with clients on a regular basis, in-between matters, can make a huge difference in your income for the year, and your client loyalty for the future. I have one client that did an additional \$50,000 in a year with a client just because he called him at the right time.
3. *Have you communicated with clients after you have handled matters to check in on their satisfaction?* This is something hardly anyone ever does. Do it and you'll really stand out in your client's eyes. It paves the way for future business.
4. *Do you ever send clients interesting articles, web links, or other information that may be helpful to them, even if it's not law related?* This is an easy and great way to stay in touch—it's the little things that count. It says 'I am thinking of you.'
5. *Do you talk with other lawyers within your firm and outside of the firm for cross-selling and referral purposes?* Keep this activity at the front of your mind, and remember cross-selling and referrals works both ways.
6. *Do you get many client and other lawyer referrals?* Referrals are the life-blood of any lawyers business. Getting unsolicited referrals says that you are doing a good job. But asking for referrals can be just as effective.
7. *Do you ask for referrals from clients and other lawyers? How often? How do you ask?* Many times we just forget to ask. Think about it and make it a habit; especially after you have just finished a matter and the client is happy about it. Be specific; "I enjoyed working with you on this matter, if you know of anyone else who might need help in this area I would appreciate it if you wouldn't mind referring them to me. Thanks again for your business!"
8. *Do you participate in community/civic organizations (especially where potential clients are also involved)? What organizations do you belong to? How active are you?* My rule is don't join an organization just to meet clients—join it only if you have an interest or a passion for what the organization does. Meeting the right people will follow; and you will have contributed your talents to a worthwhile cause—very gratifying indeed.
9. *Do you participate in professional organizations (ABA, local bar committees, etc?) What organizations do you belong to? How active are you?* If you join an organization you need to become active in that organization, not



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- just a name on the membership role—join a committee and contribute. Take a leadership position.
10. *Do you participate in association conferences of clients and potential clients? Do you have any memberships within clients' organizations? Which ones?* Once again think about the organizations your clients belong to. It makes sense to get involved with them to really get to know your clients and their needs. It demonstrates to the client that you are truly committed to their success.
11. *Do you educate yourself in clients' and potential clients' businesses with the idea in mind of "thinking ahead of your clients" to help prevent problems from occurring, and especially to show them that you are interested in them and their business?* You can never know enough about your client's business. The more you know about it, the more you'll be able to help them—this is one of the most important elements for maintaining profitable and long-term relationships.
12. *Have you done many speaking engagements at these various associations, community groups, conferences, bar CLE programs, etc., where clients will be? What topics? Where? When?* By doing speaking engagements and seminars to audiences that contain current and prospective clients you demonstrate your credibility, knowledge and expertise. Think about it as one big sales call when you are speaking to 20 to 30 people. Think how long it would take you to make appointments and meet with each audience member individually.
13. *Have you done much article writing for professional and client publications? What and when?* The same applies to article writing as to speaking engagements.
14. *What have you done, if anything, to position yourself, as a top lawyer in your practice area, with unique experience in the marketplace?* A worthy goal is to work at being the best in your practice area. Decide what you need to do to make that happen. As Ralph Waldo Emerson once said, "Those who are satisfied with mediocrity don't deserve success."
15. *Have you done a lot of reading and attended many conferences, seminars, or workshops to improve your professional knowledge of law, as well as client development and relationship management? What have you been involved with recently?* You never stop learning—a driving need for improvement and knowledge will help you ensure your success.

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