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Client Site Visits: Checklist for Success

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Studies reveal that clients, more than ever, want and expect great service from their outside counsel. On top of that, clients value lawyers who know and understand their business, as well their people and their policies. Clients also want lawyers who are trusted advisors and counselors.

Lawyers and law firms that take the time ask “How are we doing?” and take a proactive interest in helping clients achieve their goals and objectives add tremendous value to the relationship and build trust and loyalty with the client. Being a competent legal technician is simply not enough anymore in today’s competitive market place for legal services.

And what is the best way to achieve this type of relationship with clients? Go visit them. In fact, I recommend that partners visit their top four clients each year. Show you care. Ask smart questions. Listen, learn and respond appropriately.

Below is our Client Site Visit checklist, which offers practical guidance to lawyers who are interested in enhancing their relationships with top clients.

Before Your Visit

1. Be very clear on your purpose for the Client Site Visit. Determine your objectives, which might include:

    1. Thanking the client for past business
    2. Enhancing your relationship with the client
    3. Meeting individuals with whom you work for the first time
    4. Learning more about the client’s business and industry
    5. Determining ways the Firm can improve service

    6. Resolving perceived problem areas

    7. Learning about opportunities for new business

    8. Learning about other firms the client uses

2. Determine with whom you want to meet and spend time. Consider internal politics, both within the Firm and at your client's company. Think about others who should be included beyond the person(s) with whom you work most closely.

3. Determine where, when and for how long you want to meet. We recommend the client's place of business, but you may want to consider a golf course, restaurant or private club.

4. Ask for the meeting through a short letter or telephone call. Call our office if you would like an example.

5. Do your homework:

    1. Three-year billing and client/matter history

    2. Research the client through Lexis/Nexis, Dun & Bradstreet, client's web site, Martindale-Hubbell, etc.

    3. Discuss your visit with other attorneys who have worked with the client

6. Develop a list of specific questions you want to ask.

At Your Meeting

1. Arrive early and dress appropriately.

2. Start off the meeting with 5-10 minutes of introductory "small talk." Show interest in your client and consider topics like hometown, law school, family, hobbies, etc. If you are meeting in the client's office, notice your surroundings…family photos, artwork, etc. to help you with topics of conversation. Bottom line…establish a friendly rapport before you dive into your list of questions.

3. When the time is right, begin asking your pre-determined questions. Listen carefully. Let the client do the talking. Take copious notes.

4. Let the client set the pace and tone of the meeting. Be sensitive to non-verbal cues.

5. Remember that you are there to learn about the client, show interest in his/her objectives and how the Firm can improve service and add value to the relationship.

6. Keep in mind that you are not there to “sell” legal services or talk about the Firm. That will happen naturally during the course of the meeting and your follow up plan.

7. Do not overstay your welcome. Be aware of any obvious signals that it’s time for you to leave.

8. At the conclusion of your meeting, thank the client for his/her time and assure him/her that you will respond to any issues raised during your conversation.

After Your Visit

Follow up is absolutely essential!! If you don’t plan to follow up, don’t bother visiting the client in the first place.

1. Send a brief “thank you” note the day after your meeting.

2. Calendar a specific day to follow up with a telephone call, another meeting or whatever you agreed to do at your Site Visit.

3. Make sure all appropriate individuals at your client’s company are on all appropriate mailing lists for law alerts, seminar invitations, etc.

4. Develop a client-specific action plan based on what you learned at the meeting. This might involve a formal proposal for services, a follow up visit at a later time or a pro-active program to further enhance the Firm’s relationship with the client.

5. Find other ways to keep in touch with the client. Sending an article of interest or an occasional e-mail are good ways to stay “on the radar screen.” Hand-written notes are very effective and take little time.

6. Strive to become more than a legal technician in the eyes of your client. Work to become a counselor or trusted advisor to your clients.

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