



## TEN GOLDEN RULES TO MAKE YOUR NEW CLIENT HAPPY

*by*  
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We all know that satisfied existing clients are your best source of future business. They will continue to use your services when they need a lawyer, and they are your best referral source for new clients.

Yet, most clients are unable to appreciate a quality work product because they aren't lawyers. Consequently, they tend to judge the quality of your work based on service-related issues and how they are treated when they deal with you and your firm.

Allow me to use the analogy of the automobile mechanic. If you own a car, you know you need a good, trustworthy mechanic to keep the car running smoothly and to fix problems as they arise. You don't necessarily want to know what's going on under the hood. Your mechanic is supposed to know all that stuff. And you trust him to treat you right.

If you are like me, you assess the quality of your mechanic's work based on the way you are treated and whether or not you trust him. Does he listen to you when you bring the car in for servicing? Does he keep your car running smoothly? Does he provide an estimate before he starts the work? Is his bill reasonable and within estimate? Is your car clean and ready when promised? These are among the factors that most people use to evaluate the quality of his work.

I believe that these are the same kinds of factors that clients apply to lawyers and other professional service providers. They don't necessarily want to know the intricacies of the law. They want a good result. They want to feel like you are taking good care of them. They want to trust you. These factors are especially important when you are dealing with a brand new client.

As we begin the New Year, I thought it might be good time to share my "Ten Golden Rules to Make Your New Client Happy." Here goes...

### **1) Send Your New Client a "Client Welcome Kit"**

I am amazed at how few law firms do this. In addition to a well-written cover letter from the managing partner, include your firm brochure, a client service pledge, a current list of contacts with direct dial phone numbers and email addresses, and a nice gift.

### **2) Seek to Understand the Big Picture**

The best lawyers - the ones who deliver the most value to their clients - take the time to learn about their client's business (and personal) goals and objectives. They ask smart questions and do lots of listening. They understand how the particular legal matter they are being asked to handle fits into the big picture. It's also a smart idea to understand the dynamics and trends of the

industry in which your client competes. Visiting your new client's place of business is also a great way to get things started on the right foot.

### **3) Establish Your Client's Expectations and Then Exceed Them**

Walk your client through how you propose to handle the matter and what he can expect in terms of results and timelines. Create a reasonable set of expectations and do your best to beat them. If you discover you are unable to meet your commitments, or the results are not likely to be what you anticipated, share that information with the client as soon as possible. In almost all cases, you will be forgiven.

### **4) Always Follow Through on Your Commitments**

Set reasonable deadlines and do your best to follow through as promised. If you promise a draft of the contract in three weeks, deliver it in two. Nothing aggravates a client more than a broken promise. It also has a very serious negative consequence when it comes to building trust.

### **5) Promptly Return Your Telephone Calls, Always**

Nothing upsets clients more than an unreturned phone call. It's the #1 complaint clients have about lawyers. You may not think a return phone call is all that important (especially if there is nothing to report), but your client sure as heck does. Adopt a policy to return all your calls on the same day. It's a darn good habit.

### **6) Communicate with Your Client in the Manner He Prefers**

I'm one of those people who like to talk on the phone. After all, I can talk a whole lot faster than I can type. And I hate it when I place a phone call to discuss an issue with a vendor and get an email back. Most clients feel the same way. Ask your new client the method and frequency of communication he prefers and deliver your updates and progress reports accordingly. If you can't be flexible, tell your client up front how you operate. Also, see Rule #5.

### **7) Introduce Your Client to the Team Working on His Matters**

Take the time to invite your new client to your offices to meet the team who will be working on his matter. And make sure you include the paralegals, legal assistants, receptionist and others he is likely to be talking to on a regular basis. First, it makes your staff feel part of the team and, in many cases, your client is likely to be interacting with them more often than he does you.

### **8) Resist the Temptation to "Overlawyer" the Matter**

Trust me; clients don't want to pay their lawyer more than necessary to have their matter properly handled. Many law firms feel the need to research issues to death and uncover every stone to make sure they are 100% correct. Yet, most clients are happy with 90%. Worse yet, the pressure to generate billable hours often encourages inefficiency and "overlawyering" to meet performance requirements. Be sensitive to the issue and do what's right for your client.

### **9) Never, Ever, Send a Surprise Invoice**

It's good practice to discuss estimated fees and costs up front with your new client. Give him a ball park estimate of what your fee will be and discuss any unforeseen developments that may arise. Talk through the options and seek your client's direction on how to handle them. Never, ever, send your client a surprise bill. Beyond failure to communicate, this is one sure way to lose your new client and he's likely to tell others about the experience.

### 10) Show Your Client That You Appreciate His Business

Be sure to invite your client to your firm's annual client appreciation event, take him to a ball game, play golf and invite him to lunch or dinner on occasion. Invest time in building the relationship. Holiday cards are nice, but not nearly enough.

There is more to practicing law than providing quality legal work. You've got to provide great service, too. If you practice these golden rules consistently, you will end up with loyal, long-term clients and an enjoyable and gratifying legal career. And that's a promise!

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### About the Author

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