

## Six Ways to Fix Your Follow-Up

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By Adrian Dayton



What is the No. 1 impediment to lawyers building their books of business? “Failure to follow up,” said James Stapleton, chief marketing and development officer for Littler Mendelson.

“In my experience,” he said, “there is a high correlation between the amount of follow-up that gets done and the amount of business that a professional will sign. And it is almost a straight-line relationship.”

Stapleton explained: “At its base, when you are following up, you are in pursuit. You are framing yourself as a predator. You want to pursue a client that you know you can do the best job for, and you are the right attorney for that person.”

So why doesn't it happen? “The ego of the attorneys gets in the way,” Stapleton said. “They have always been the smartest person in the room, and the attorneys usually feel like the client should be pursuing them. And that is completely counter-productive.”

He suggested six guidelines for lawyers to follow up in the right way. “First, exhibit interest in the client as something other than a fee-generating vehicle. Show an interest in their business, not just in their legal work,” he said.

“Second, learn a little bit more about them each time. Be active in your questioning and be an extremely active listener.

“Third, you must teach them something about you each time. Otherwise, you aren’t advancing the relationships.

“Fourth, you have to bring something to the party.” In other words, you want to add value every single time you communicate with a client or prospective client. Forward an article; share insights about a problem he has been dealing with; introduce her to someone helpful. Do this every time you communicate. And don’t allow more than five weeks to pass between contacts. If you keep adding value, clients will come.

“Fifth, you have to get them to make a decision,” Stapleton said. “Get them to make some sort of affirming decision. Coupons work in a similar way—this bribe gets a buyer to make a decision.” Only one in every 100 people who receive a coupon end up buying something, “but coupons still move a lot of product.” You may convince a potential client to consider you the next time a problem comes up. On the other hand, your involvement can be as simple as sharing some strategic advice.

“Sixth,” Stapleton said, “build a bridge.” Or, as I often put it, the purpose of every meeting is to secure another meeting. “This is asking for another commitment,” Stapleton said, “and it is essential.”

Social media are “a great tool for follow up, because it is so easy to point to things that add value. Still, to me the tool isn’t as important as process,” he said. After all, one in eight clients is unhappy with its representation at any given moment and one in 30 is changing firms, in Stapleton’s experience. “Anything can happen in a year. Make yourself No. 2 to as many clients as possible.”

Behind every successful business is an effective process, so I asked Stapleton to explain what happens when lawyers approach follow-up like professionals. “If you do 70 percent of what you mentally promise yourself you will do, you will be fine,” he said. “The key is that you need to have a way to ensure that it will be done.”

A great starting point is to look at your schedule. “It is absolutely critical to schedule time to do this,” Stapleton said. “Absolutely critical. Every day, even only for 20 minutes. Close the door, hold your calls and do what you gotta do.”

“Next, get some help. I have seen internal groups that remind themselves and discuss follow-up. Coaches are excellent for this — find [a method] that works for you.”

Training on follow-up isn’t enough. “Training is education. Coaching is for behavioral changes,” Stapleton said. “Most attorneys know what they need to do. The key is, in some instances, to have bottom-up sales management, where a marketing manager visits the office and follows up on your to-do list. I did this with a dozen partners and for a reasonably senior person and the results were impressive.”

He continued: “Follow-up is largely mechanical. It doesn’t take good charm or storytelling. One name partner I worked with at a previous firm did only 23 percent of the follow-up he said he would do, and he was very unsuccessful.”

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Stop making excuses and start following up. This one factor could make a major difference in growing your book of business.

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