

Understanding the Needs of Your Clients

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Do you know what your clients need? Which legal services? The problems – business-critical problems, not legal ones – they are trying to solve? That which keeps them awake at night? How can you find out? What do you need to know? How does knowing what they need translate into more work for you?

It isn't as easy as it might seem to obtain actionable intelligence about your client from that client herself. You'll have to do your homework, learn as much as you can so that you can have a credible discussion with her about how she runs her business. You'll have to convince her that she should talk to you about her business, convince her that it will be valuable for her to talk to you, convince her that you know your stuff. You'll have to identify – and execute without fail – follow-up that will help her solve her problems or sleep better at night or send you a thank-you note for your trouble. It won't be easy. It will most likely require you to operate far outside of your comfort zone. But it will pay off.

Here's what you need to do:

Identify your true targets

Make a list of your favorite clients, the ones you can't wait to work for, the ones who always pay your bills. These are your target clients, the only ones you should be chasing. Prioritize them based on your assessment of the opportunity for additional work (criteria include the strength of your relationship with the client, the size and scope of the client's legal needs, your ability to respond to those needs, the percentage of the client's legal work you're already doing, etc.).

Keep in mind as you're developing your list that the main objective of creating the list and making the effort is to help move your most valuable clients from the "I wish I could be doing more work for them" category to the "I think I'm doing most of the work that I could realistically do for these great clients" category. You're not creating a list of the only clients you will work for in the coming six / twelve / eighteen months. You'll continue to look for work from clients not on the list, you'll keep working for clients you don't think offer long-term opportunities, you'll occasionally get lucky and get a new client that you'll want to add to the list.

Do your homework

Spend a few hours learning as much as you can about the first client on your list. It doesn't have to be done in a day or a week, but you need to know their business, their industry, their competition, their challenges, and, most of all, how they define success and how well they are achieving it. Make a list of what you believe to be the five critical business issues facing that first client. Do those issues have a legal element? Is it work you can credibly do? Are there upcoming developments in the law that will affect your client's ability to do business and succeed?

Draft up an outline of the conversation you'd like to have with your client: an introduction, all of the questions you would like to ask, all of the answers to the questions you think he might ask you, a few points that will establish your credibility, a few points that will establish his trust, a few points that will show how smart you really are. I think it is very useful to set this up as an interview, the kind where you have to prove in the first five minutes that you are worthy of asking the questions, where you listen to the answers and ask the next question based on what you've learned so far, where you don't assume that the first answer you get is the real answer, so you need to dig a little deeper to uncover the truth.



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Talk to your client

Have a conversation with your client. Yes, you'll have to create an opportunity. Yes, you will most likely be just another unpleasant obligation on his schedule (at least until you've proven the value of a conversation with you). Yes, you might even have to call in a favor or two. But find a way to have a meaningful conversation with your client at a time and a place where you can get his focused attention, where you can get him to let down his guard a little, where you can take the time needed to show how you can add value.

Ask him questions about his business, his industry, his competitors, his challenges, how he defines success. Use the knowledge you learned in your research to sound like you know his business better than he does. Follow your outline as best as you can. Ask a lot of questions without answering them yourself. Talk about the legal elements of his business issues as if you've already solved his problems. Listen to what he tells you. Don't force the conversation. Don't make a sales pitch. Don't interrupt.

Make a follow-up list. Do it. Repeat

After that discussion, armed with everything you've learned, identify three things you can do for your client that will help her be smart or happy or successful or all three. They don't have to be complicated. In fact, the more complicated they are, the less likely you are to do them. Things like "send two-paragraph summary of pending labeling legislation" or "identify cross-border tax specialist with shipping expertise" or even "invite to concert in late June."

Once you've written them down, do the things on your list. Without fail. Don't put them off, don't talk yourself out of them, don't forget. Do them as soon as you can, then come up with three more and do them too. And three more after you've done those. Keep doing things for your client, things that will help her be smart or happy or successful or all of the above, and she'll soon think you're the best lawyer she's ever met, the lawyer who provides real value, the lawyer who will be getting more and more of her work.

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When you're at a point where you are regularly demonstrating your value to that client, move to the next one on your list. You should be working on two or three client relationships at a time, enough to keep your opportunity pipeline flowing, but not requiring so much time that you end up doing nothing or, worse yet, not meeting the obligations of your practice. The goal is to keep looking ahead, to maximize the value of your business development time, to minimize the burdens, all the while producing results.

It won't be easy to adopt a more disciplined approach to your business development activities. It will take time and effort and occasionally money. It will force you to do things you probably don't want to do even if you know they are right. But if it seems overwhelming, remember that you don't have to change everything, not all at once. The first step is just to make it a little better. If you follow this plan, you'll be well on your way.