Business & Careers

Mastering the follow through

Reeling in clients starts with successfully connecting after the initial meeting

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Networking events are ideal places for lawyers to rub shoulders with potential clients, develop leads — and perhaps hand out some of those business cards that have been gathering dust.

But what happens after a meet-and-greet? How do lawyers go about re-connecting with those potential clients, build a relationship with them and, in the end, bring them on board?

Being too passive — or too aggressive — won't help. The approach has to be just right.

"There's no foolproof way to do it," says Suzana Popovic-Montag, managing partner at Hull & Hull in Toronto. "Some people are really good at following up with e-mails and if they travel a lot that might be convenient for them. For other people it could be a simple phone call.

"It really is a balancing act between appearing desperate and not wanting to appear desperate, but also not wanting people to forget about what you do and how you can help them."

The follow-up, says Popovic-Montag, depends a lot on the lawyers and their personal style.

"If I've spoken to someone and a case comes to mind or is in the newspaper, it might be an opportunity to refer to it in a call or e-mail and say, 'Here's a copy of a decision that might be of interest.' It sort of reminds them of you without really being too much in their face."

After meeting a potential client, Popovic-Montag often follows up with a handwritten note.

"Certainly e-mail is fine too, but it's a little bit more personal when someone's put a pen to paper and put it in an envelope and sent it along to you. There's a friendliness to that and it makes it stand out from among all the other e-mails we get during the course of a day."

At the initial meeting, Popovic-Montag says lawyers should try to figure out what form of communication works best for the client, then tap into that as a means of staying in touch.

"It could be that, 'This person is really good with e-mail,' or 'They're really good in face-to-face meetings,' or 'They need the phone to be picked up and they don't want to read a 10-page e-mail.' You have to develop a style of communication that works for each individual."

Jane Southren, a lawyer and director of professional business development at Lerners LLP in Toronto, says at the initial meeting lawyers should find areas of common interest with potential clients and use whatever was discussed as a hook to re-connect with them.

"If they've managed the initial meeting properly they will have identified some common ground or common interest or a reason to connect. All of that will have been established.

"Whatever the next touch point is going to be should always be driven by what happened in the meeting before and that should continue to flow along so it keeps the connection live. You don't want to be thinking, 'Hmm, what basis do I use for getting in touch with this person?'"

When lawyers leave a meeting with potential clients they should also be articulating what the next step will be, whether it's connecting via LinkedIn or meeting for a coffee, says Southren.

If the lawyer and potential client talked about a case, it might be as simple as sending a document, she says.

"Whatever came out of the initial conversation will be the reason and a basis for connecting."

Southren says lawyers are often concerned about seeming too desperate when following up with a potential client. But lawyers need to remember they have skills and talents and are offering to solve problems, and they should focus on the fact that they're offering services that will help to remedy a situation for an individual, she says.

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