BUSINESS & CAREERS

How to start a new client relationship

THE COACH

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When approaching a new client relationship, there are many factors that will affect your clients' perception of the outcome, and therefore their satisfaction level. This column serves to offer insights and strategies to help you create winning conditions from the start.

Discovery

The first strategy is to learn everything you can about your new client — his or her goals, challenges, big picture vision, reasons for this particular legal action, and so on. I cannot stress enough how important this is.

Whether your new client has come to you by way of referral, a cold call into your office or as a result of you cultivating a relationship, you must have all the information possible before you can begin to serve them to your highest standards.

This first step of discovery is as important for you to qualify your new client as it is in gathering information. If they are unwilling at this point to give you what you need, what are they going to be like to work with? Is this going to end up wasting a lot of your time? Will it result in them being unhappy and putting the blame on you? Carefully measure your risk here. How needy or high maintenance are they going to be? Is their primary concern price point? How can you counter that? Is this a client you truly want to serve?

On a more positive note, when you take the time upfront to learn everything you can, it will serve you well in discovering other ways to help your client or identify growth opportunities. It will also give you an idea of their strategic direction and how much you could be involved in helping them get there.

Pitch strategy

When you get past this first stage and you have determined they are a client you want to serve, crafting your pitch is the next thing to look at. Are you in the habit of pitching low just to get the file? Or do you pitch high to give your new client a worst-case scenario? If you pitch low you could be setting yourself up for disaster later on. What happens when the file goes sideways? Do you write off your time to come in within your quote? Will you have to offer your client a discount? Will they even pay the bill?

Conversely, if you pitch too high you could scare them off from the outset. While this is a safer approach, I recommend if you do take it suggesting to them that there may be lawyers or firms who will underquote just to get the work — and that in the end they could end up paying a lot more than what they initially agreed to.

This is what makes the first step — Discovery — so much more important. In asking them the right questions from the start you will be better equipped to gauge the level of sophistication. This will help you in crafting your pitch strategy. There are pros and cons to both high and low approaches. We all prefer sophisticated clients. It makes our job so much easier. But what do you do when you have a new client who you deem to be less than sophisticated? If you choose to work with them anyway, the next step becomes even more important in the process.

Setting expectations

Setting expectations from the start will not only assist you in working with less sophisticated clients, it will go a long way in enhancing their satisfaction. Part of this will require you to educate your less sophisticated clients in how things will work (based on your experience). That will help to alleviate some of your stress in dealing with the client.

The key areas here involve helping your clients keep their costs down, setting the bar for communication and setting the "need to know" parameters.

When you can help your clients keep their costs down, they will appreciate your efforts and likely reward you with more work. You can do this by explaining how the typical process works, how you like to work and setting the bar. Your less sophisticated clients will need more direction here and this is how you can educate them to become more sophisticated. With hope, this investment of your time will pay off in spades later on.

How you communicate with your clients is equally as important. Do you ask them from the start how they like to be communicated with? How often do they need it? How much information do they need to know? Finding this out from the very beginning and then following it will support the client satisfaction and help you help your clients to keep their costs down.

Understanding how much and when your clients need to be a part of the process will also help you to help them keep their costs down. What are the authorization stages? What do they need to be aware of and sign off on? How much leeway do you have? Agreeing with your client on these points will make the process a lot smother for the both of you.

So remember, first take the time to get to know everything you can. Second, carefully choose your pitch strategy. And third, set expectations from the start. Those who have followed this advice have noticed a marked improvement in client satisfaction and less stress in serving them. ■

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