

WHAT COLOR IS YOUR UNDERSHIRT?

How To Get Clients and Keep Them Happy - Without Stepping Out Of Your Comfort Zone

By Lisa Miller, Esq.

Business Development Consultant

Overview

Most attorneys, in their dark suits and white shirts, appear cut from a single bolt of cloth. But many different personality types exist within that uniform. This individuality requires customized business development approaches. In business development as in T-shirts, one size does not fit all.

Solo and small firm attorneys who have researched business development issues usually find the standard advice list: write and speak, network, volunteer, sponsor events and innumerable other useful directives.

All of these tenets are sound, but most lawyers can't effectively implement all of them. They are too numerous for smaller firms to handle.

Attorneys have individual skills and strengths, so the lawyer's time and money investment in some of these directives is wasted when personal talents are not a good fit with the generic tasks.

The result is that many lawyers do very little business development activity, far less than they would like.

To counter this inertia, each attorney must identify what type of marketer counsel is, and then invest the lawyer's scarce time and money resources in a targeted and intelligent manner. To maximize business development return on investment, counsel needs to implement business development strategies that suit the individual attorney.

The "Miller Matrix" will help counsel focus on and maximize the impact of the business development activities that are the best fit with the attorney's personality. And once counsel wins new clients, these same approaches help keep clients happy.

Lisa Miller
Lisa Miller Consulting
818-761-5910

The Miller Matrix

Who Am I?

Know It Alls

Subject matter experts.

Immediate insight and analysis on new developments.

Devoted to mastery of a defined practice area.

Focus on technical expertise.

Deep Thinkers

Obsessive problem solvers.

Insightful, intellectual and analytical.

Creative approaches and solutions to legal problems.

Focused on legal challenges.

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Nurturers

Client-service focused.

Skilled in managing long-term relationships

Consistent "go to" contact person for firm clients.

Cement client loyalty through stellar responsiveness.

Naturals

Traditional rainmakers.

Relationship initiators.

Effortless networking through interpersonal contacts.

At ease in almost all social settings.

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Lisa Miller, Miller Consulting

Lisa@LMillerconsulting.com

(818) 761-5910

Lisa Miller
Lisa Miller Consulting
818-761-5910

The Miller Matrix

What Does It Take?

Know It Alls

Subject matter experts.

Speak and teach.

Write and publish.

Develop and maintain strong ties with the media.

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Deep Thinkers

Obsessive problem solvers.

Legal clinics, one-on-one counseling with prospective clients.

E-mail or paper updates to clients and potential clients.

Network with lawyers for inclusion in other matters or referrals.

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Nurturers

Client service focused.

Volunteer with large organizations.

Small complimentary services for existing and prospective clients.

Execute on-going follow up.

Naturals

Traditional rainmakers.

Events and entertainment.

Meaningful participation in significant organizations.

Use technology to support continued follow up with contacts.

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Miller Consulting

(818) 802-1709

Lisa@LMillerconsulting.com

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Lisa Miller

Miller Consulting

12003 Hartsook Street

Suite D

Valley Village, Cal. 91607

(818) 761-5910

Lisa@lmillerconsulting.com

Lisa Miller
Lisa Miller Consulting
818-761-5910

Lisa Miller's

Business Development Planning Traps To Avoid

Even law firms with the best intentions sometimes trip themselves up with a few common errors in business development planning.

Here are tips on traps to avoid:

I. Keep it simple.

Complexity in business development planning leads to inertia.

II. Eliminate the negative.

Include in the plan only projects and ideas that appeal to you.

Keep tasks manageable.

Small achievements lead to larger accomplishments.

Set deadlines.

Calendar follow up on deadlines and stick to the schedule.

Include clients.

Look for opportunities to partner with existing clients on projects.

Stay realistic.

Perfection isn't achievable, so preserve your sanity and don't even try.

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818-761-5910

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Keeping Your New Clients Happy

Keeping clients happy is a variant of the business development techniques for winning new clients. The audience is identifiable rather than conjectural, and the expectations might be a bit more concrete, but the ability to build and maintain relationships within counsel's interpersonal comfort zone is still the key.

I. Billing should be close to the estimate, or in the alternative, clients need the earliest possible warning when fees will overshoot their budgeted amount. Review bills before they go out to clients to be sure they track with time records.

Deep Thinkers are probably best at this, but all lawyers should make this a habit, no matter what practice style is in play.

II. Keep clients informed in the manner in which they are most comfortable. Some more tech-savvy clients might benefit from readily available networking solutions to keep in touch.

Deep thinkers may want to do this electronically or by mail and naturals may want to delegate this task to another team member, but all personality types should keep this in mind.

III. Visit with clients even where no underlying matter exists on which counsel is billing. This allows counsel to tease out current legal issues for the client and offer some guidance, reinforcing the relationship as an advisor and counselor. If any problems with prior legal representation or billing exist, this visit can address them, limiting bad feelings.

Nurturers and Naturals can do this with the greatest ease of the four personality types.

IV. Offer complimentary services, such as training or audits in the workplace. This makes clients feel that even without a billable matter, counsel cares about the company's overall well-being.

Know It Alls and Nurturers are best at this type of client relations building.

V. Forward articles of interest to the client, yours or by other authors, with a note relating the subject of the piece to the client's business.

Deep Thinkers, Know It Alls and Nurturers can all use this technique comfortably.

VI. Involve clients in events and entertainment opportunities. Everyone likes to be included and everyone likes free passes to something desirable. Keep in mind the individual interests of the recipient when making this offer, however. Some contacts might prefer a spa day over sports tickets, for example.

Naturals and Nurturers are a good fit with this approach.

VII. Client satisfaction surveys can provide valuable insights for law firms, but are controversial in the legal field. Some firms shy away from them, thinking they demonstrate a lack of confidence by the firm and can lead to loss of clients. If the firm chooses to employ a survey, the firm should consider a face-to-face meeting between the client and an attorney from the firm. In general, a form questionnaire in the mail brings little response and does not allow for probing in fertile areas.

Nurturers are probably best at this very difficult assignment.

VIII. Keep your promises, no matter what they are.

All practitioners should keep this in mind.

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