HOW TO GET AND KEEP GOOD CLIENTS

1. Always carry high-quality professional cards.

2. Always offer clients and other visitors coffee or a soft drink while they wait in the reception area.

3. Be sure your reception area contains periodicals indicative of the kind of practice you want people to think you have.

4. Be careful when you answer the question, "What kind of law do you practice?" Don't limit yourself or your firm.

5. Always send thank-you letters when someone refers you a client.

6. Always send thank-you letters to the witnesses who testify for your side (if the local rules permit).

7. Either return all calls yourself or be sure that someone returns them for you. Return all calls before the end of the day and preferably within two hours.

8. Always send clients copies of all "correspondence in" and "correspondence out."

9. Dress the way you would expect your lawyer to dress if you were a client paying a fee.

10. Always get as much cash up front as possible from new clients. This is a modification of Lincoln's statement that when a client has paid cash up front, the client knows he has a lawyer and the lawyer knows he has a client.

11. Always be sure that your fee agreement is in writing.

12. Always send your clients Christmas cards or Seasons Greetings cards.

13. Remember that your invoices are a factor in your clients' opinion of you.

14. Dump the dogs. Get rid of the "Bad News" cases and clients as soon as you know you have a problem before they really give you problems.

15. Learn how to convert "social consultations” at weddings, etc., into paying clients by being attentive, letting the person know they may have a serious problem and suggesting they come into your office where you have facilities for helping them.

16. Remind the nonlawyers in the firm that they can also refer their friends' legal matters to the firm.

17. When a staff member refers a client, give the staff member a praise in a memo that goes to everyone in the office to remind them that they can also refer clients to the firm.

18. Remember that immediate availability is the single most important factor in your being selected or not being selected after you are recommended.

19. Always send a tax news letter in November, reminding clients of new tax laws that might affect them. Be sure you remind them that cash basis taxpayers can only deduct legal fees if they pay them before December 31st. Show the client how a bill can be tax deductible if possible.

20. Send clients "no activity” letters when a case is inactive for ninety days or more.

21. Always discuss fees and payment schedules at the first meeting and confirm your discussion in writing.

22. Always remind the client that the firm has a good reputation in the community.

23. Always reassure the client that you have handled similar cases to theirs (if true). Clients don't like being used for educational purposes.

24. Calendar ahead and remind clients of the need for annual minutes of shareholders or directors meeting, lease renewals, judgment renewals, etc.

25. Recognize and appreciate that clients have a high anxiety level when they go to see a lawyer. Be prepared to meet it.

26. Be careful if you adjust a bill downward so that the client doesn't think that you were deliberately overcharging to begin with.

27. Be sure that you and not the clients decide which clients are going to get free legal work before you do the work.

28. When collecting fees, try to match clients' payments to you with clients' receipt of money or cash flow.

29. Always be firm and in control in your manner with clients when discussing the case or discussing fees. If you act wishy-washy or wimpy, your clients will quickly lose confidence in you and stop using you and stop recommending you.

30. Don't complain about how hard you're working. The prospective client may feel you have no time to devote to their matter and go elsewhere.

31. Always use high quality legal stationery for client communications with your address clearly legible. Use large-sized fonts for correspondence with senior clients.

32. Always have some hard-back, firm chairs in the reception room for injured or elderly clients.

33. Always introduce your clients to your secretary and to paralegals and/or associates who will be working with them or on the case.

34. Always get new clients into the office to meet them before giving them any legal advice whenever possible.

35. Be wary of clients who have lots of complaints about their former lawyers. It is probably just a matter of time until you are on that list of lawyers.

36. Always communicate to a new client that what the client tells you is normally covered by attorney-client privilege and that you won't discuss the client's affairs with other people.

37. When an interview is over, stand up, walk to the office door, and tell the client that the interview is over and walk them back to the reception area or elevator.

38. When the case is over, send a letter to the clients thanking them for the opportunity to have been of service to be sure they are not expecting you to do more work on the case.

39. When a client offers you a cash fee saying "nobody will know," don't forget that the client knows and may be setting you up for blackmail.

40. When a case is lost, be simple, direct, and honest. Tell the client by phone or in person as soon as possible and follow up with. a letter.

41. When quoting settlements, be sure the client understands the difference between gross settlements and net settlements after fees, costs and liens and acknowledges the difference in writing.

42. When quoting fees, be sure to cover (in your fee agreement) the difference between fees and costs and what the fee does and does not cover.

43. When collecting fees, remember that people are more willing to pay for what they desperately need and don't have now than for what they used to desperately need and already have. Clients are more eager and willing to pay before the

work is done than after the work is done. They will feel better and you will feel better if you get an advance retainer check before you do the work.

44. Always ask a client whether to send mail and e-mail to the home or the office or if the client wants to pick up the mail (to keep information from getting into the wrong hands).

45. Keep a photo of your children or family on your desk facing you to remind you of your unpaid bills and your need to be sure that the clients clearly understand and can meet their financial obligations the case.

46. Have someone call your office for you while you listen in and see if you are satisfied with the way your phones are handled. See if the receptionist projects a helpful attitude or is simply functioning as a human answering machine. Remember, people can and do hang up and call other lawyers when they're not happy with the way their call is handled.

47. Remember to give the client a road map of the matter at the first meeting, telling the client what will happen, when it is likely to happen, and what it is likely to cost.

48. Remember the clients want you to listen to them tell their story. Remember you have 2 ears and 1 mouth. It was intended that you listen 2/3rds of the time and only talk 1/3rd of the time. Otherwise you would have two mouths and one ear.

49. At the end of an interview, always ask the question, "Is there anything you want to ask me or tell me?" Tell the client, "I don't want you to leave here upset that you never had a chance to tell me something you wanted to tell me or ask me something you wanted to ask me."

50. Limit your pro bono work to 5 percent of your time or you may become pro bono yourself. Tell clients and potential clients that you do pro bono work, but must limit it to 5 percent of your time.

51. Be very careful of conflicts when you have more than one client in a matter. Be sure to get appropriate waivers and consents to avoid being conflicted out of the matter without getting paid. Clients will appreciate your strict compliance to ethical rules. If there are two or more people in the room, ask yourself (and them),
. "Who is the client and why are the others in the room?" Have forms ready to cover the various situations.

52. Be flexible and creative in helping the client figure out ways to pay for the legal. services they need. They will appreciate your working with them and both

you and the client can avoid unreasonable expectations. They might appreciate and be receptive to alternate billing methods.

53. Be sure you have a web site. When you are recommended, clients will often check you out on the Internet before deciding to call you. Include your areas of practice. Try to include your full name in your web site URL and in an e-mail address, so that clients can contact you by simply remembering your name.

54. Consider having a Web site that includes your geographic area of practice for potential clients looking for a lawyer in a particular city, county, state or neighborhood.

55. Be sure a caller can immediately reach a live operator without several minutes of voice-mail hell. Clients are often nervous or upset and often do not have the patience for voice-mail prompt systems. If you are not in the office, the receptionist should ask callers if they wish to speak to another person or leave a voice mail message. This may deter a potential client from calling another lawyer when you are not immediately available.

56. Remember that a client or potential client is more likely to choose you based on your friendliness and demeanor than on your legal skills.

57. Remember that Yellow Pages are extremely effective in attracting certain types of work in certain communities. Do not advertise in the Yellow Pages unless your staff is trained on how to handle the calls which the ads produce.

58. Add clients' names to your spell checker to reduce the possibility of misspelling their name.

59. Keep a written list of who refers clients to you and to whom you refer clients and review it at least once a year.

60. Calendar client birthdays, anniversaries, or other important events to send cards or e-mail greetings when appropriate. Be sure to have the names of your own spouse and children and clients' secretaries on the list.

61. Prepare a written document to be given to the receptionist on duty listing the most important clients and the difficult clients and how to work with them. Include how the clients' names are pronounced. Indicate who covers for whom when the called person is not available.

62. If you have not spoken with a client in ninety days, call the client just to say hello. Start the call with: "I'm not calling on any specific legal matter. I'm just calling to see how things are going as we haven't spoken in a while." These calls often result in a new legal matter that needs attention.

63. Protect your mailing addresses (postal and e-mail) if you move or your zip code or domain are changed. Have mail forwarded even if you will also get junk mail and spam. Clients get very upset when they get mail returned "return to sender" or "undeliverable." Be sure to renew the forwarding services and notifications when they would otherwise expire and keep a stack of notices to send out every time you receive a forwarded item.

64. Protect your phone number and fax number if you move or if the area code changes. Have your phone calls and faxes forwarded to the new numbers. Clients get upset when they hear "This number is no longer in service." They may simply call lawyer #2 on their list rather than spend time and money calling information to get your new number.

65. Remember, you have a sales force consisting of yourself, your firm, your family, your friends, those who refer you clients and your former and existing clients. You are only one person. They are hundreds. Utilize the leverage of your entire sales force instead of trying to do everything yourself.

66. Send clients alerts as to new laws and cases which may affect them or their business. Utilize e-mail or fax blasts to be the first person with the news ahead of printed formats.

67. Always shake hands with a client when saying hello or goodbye. Touching by way of handshake, cheek to cheek kiss, or other means appropriate to the client's age, gender, and station is a basic human trait of friendship.