Sustainable LTR: Learning the Ropes on Client Cultivation to Establish Long-Term Relationships

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Everyone wants to be a rainmaker. Television shows and movies romanticize the concept of the big-time attorney with the mahogany office that just cannot seem to hang up the phone because business is booming. Many articles, CLEs, and books about building business focus on securing new clients. Less attention is given to best practices for cultivating an existing client relationship—an imperative task for which responsibility is shared from staff to partners.

The legal field is rife with acronyms. A short and simple one is at the heart of this article: "LTR." To "Learn the Ropes" on cultivating a client relationship, remember the end goal of establishing a "Long-Term Relationship" with the client. Cultivating a client relationship requires meeting and adapting to a client's evolving needs. That is particularly true in a world which has been reshaped by a global pandemic, resulting in a multitude of new legal issues and exposure.

While some client relationships are inherently short-lived, meet the objective of a sustainable and successful practice by developing long-term relationships with existing clients. Guidance from peers and colleagues can facilitate development of the skills necessary to establish a meaningful and mutually beneficial LTR.

Building the LTR

Be mindful of the importance of reputation. Demonstrating professionalism, adaptability, and candor from the outset is paramount. This does not apply only to immediate client contacts, but to each member of the client's organization, co-counsel, opposing counsel, and judges. Clients take notice of performance in all aspects of communications, from e-mails, to motions, to courtroom presentation. The manner in which you interact with the individuals around you reflects on your character—and equally important, on the client you are representing.

Establish the preferred method of communication with the client. Clients value open dialogue, and it is crucial to be mindful of the many communication options. Early in the relationship (with periodic follow up after that), discuss communication preferences to ensure exchanges are frequent but efficient. Emphasize availability via numerous avenues, including video-conference, which has the added value of personal touch without the associated travel time. After calls or meetings of any form, be sure to memorialize the conversation and goals established, not just for record-keeping, but for ease of reference for the client. This also makes it easier to track accomplishments.

Check in regularly to confirm client satisfaction. Attorneys are charged with presenting detailed analysis, alternative courses of action, and recommendations, in a solution-oriented manner. Consistent with that obligation, check in with the client to ensure comfort with the way strategy, exposure, and settlement evaluations are being communicated. Every outcome, regardless of the result, is an opportunity for the attorney and client to more cohesively move forward together. Debriefing after important events is a great way to receive input and seek direction for improvement.

Becoming a Resource and an Ally

Report salient developments to your client. Demonstrate continued value by keeping the client apprised of developments in the industry, particularly when those developments will impact legal strategy. Provide articles, tips, and case law, with a short summary of the relevance to the client's business or a pending case. Look ahead for developing issues and brainstorm how to attack them, so you are ready if they arise.

Show commitment and investment in the client's goals and future success. For example, become a leader in organizations that matter to the client and use that leadership to drive change.

Demonstrating Continued Value in the LTR

Demonstrate unique value to the client. Inform the client of the nature of the value being brought to the table. Apprise the client of favorable results to maintain confidence. If a creative method is employed to tackle a nuanced issue, do not let that opportunity for reporting success slip away.

Give credit where it is due. Results are dependent on individuals working at every layer of the chain. Exhibit consistency in handling of the client's work. Highlight the accomplishments and dedication of team members to build confidence in counsel's ability to lead and orchestrate a powerful team. Where appropriate, recognize members of the client's team to their superiors.

Take Away

Remember "LTR." Learn the ropes on client cultivation, and focus on establishing long-term relationships. Securing new business is an achievement and necessity, but maintaining existing clients and evolving with their business is key for a successful practice.

Practice Areas

Class Action

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Offices

Miami