

# Leverage Meaningful Client Touchpoints

## WRITTEN BY

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Successful business developers prioritize building personal relationships, making connections and adding value through meaningful touchpoints as a strategy for growing client relationships. This personalized approach is more impactful than throwing a fishing pole into the vast sea of request for proposal solicitations and blind pitches and hoping that something bites. Sustained, meaningful touches with clients are key to building the rapport and trust that make clients want to give attorneys their business.

Attorneys commonly confuse *ordinary* touchpoints, such as sending emails and returning client phone calls, with *meaningful* touches. Touches are meaningful when they are responsive to individual client needs, priorities and pain points. When touchpoints focus on making a client's life easier by adding value, making connections and offering solutions, the business development impact is extraordinary.

In my work as director of client experience for Troutman Pepper, I have witnessed meaningful touchpoints in action across a variety of practice areas—from corporate transactions to intellectual property to business litigation. One of the joys of my work is celebrating with attorneys who have trusted the process and are now enjoying the fruits of their labor as their practices thrive.

This article demonstrates seven ways you can effectively apply meaningful touchpoints throughout the client journey, highlighting real-life examples from my experience at Troutman Pepper.

**1. Show interest in your client's business.** Remaining abreast of new developments in your client's business and industry arms you with useful insights that can advance a client relationship. Changes in leadership or corporate strategy present opportunities to schedule meaningful conversations with clients. The goal is to demonstrate your interest in the client's business, understand the impact of the changes, and open the door for additional follow-up conversations and meaningful touchpoints.

For example, an attorney used a client's corporate headquarters relocation and leadership changes in its law department as an opportunity to have an updated discussion about the client relationship, the client's most pressing priorities and the anticipated impact of the relocation on its outside counsel selection strategy. The attorney also used the discussion to plant seeds for follow-up meetings with the client as part of the firm's client feedback and value programs.

**Best practice tip:** When meeting with clients about their business, goals and priorities, use questions to demonstrate intellectual curiosity and uncover unmet client needs, and actively listen to the client's responses. Request a follow-up meeting to offer value-adds related to what you learned. Use phrases like "Would it be helpful if ... " to advance the conversation in ways that are meaningful to the client.

**2. Demonstrate your expertise at no cost to clients.** A consistent theme across clients of all sizes and industries is that they want to maximize the value they receive from outside counsel relative to the fees they are paying. Although clients define value differently, most, if not all, find value in receiving meaningful guidance from outside counsel—at no additional cost—about legal and industry trends that may impact their business. These updates can be provided via CLE presentations or personalized client alerts. In addition to adding value for the client, this guidance allows you to demonstrate your expertise or the expertise of a colleague on a particular topic, which can lay the groundwork for future engagements.

In the early days of the pandemic, one of the firm's attorneys, at a client's request, gave a presentation on COVID 19-driven practice trends and legal tech tools. As a result of the presentation, the client's perspective of the firm's expertise was significantly expanded, and the client requested follow-up meetings with additional attorneys and staff to learn more about how the firm could help with a variety of additional legal and operational needs.

**Best practice tip:** When you have an opportunity to demonstrate your expertise to a client, focus on trending topics to show that you are informed and ahead of the curve, explain why the topic is important to the client's business, and provide practical examples of what the client should do now and what they should anticipate in the future.

**3. Use innovation and technology as a value-add and differentiator.** As competition among law firms continues to increase, clients are demanding more than just competent legal counsel. Going the extra mile by focusing on being a better business advisor and problem solver for clients is a huge differentiator for attorneys. Offering clients innovative solutions and technology tools that are tailored to their priorities and pain points is a meaningful way to add value and stand out among your competitors.

Our lawyers and business teams have partnered with clients to develop bespoke solutions that are responsive to clients' specific needs. Through a thoughtful co-creation process involving the clients, we have built web-based portals, mobile apps, financial dashboards and software that enables clients to track the diversity of attorneys staffing their matters. The firm has also designed prototype scorecards to help clients evaluate their outside counsel. These types of solutions have helped clients address their business needs and meaningfully advance their own legal operations efforts, while at the same time have positioned the firm as a leader in innovation and technology.

**Best practice tip:** Actively seek opportunities to promote innovative value-add tools and solutions with clients, emphasizing a one-size-fits-one approach to ensure that each solution is tailored to the client's individual needs. You don't have to have a fully stocked toolbox full of bells and whistles to be innovative—for some clients, a simple checklist or process change is considered new and different. The key is to uncover where your clients may be struggling and brainstorm ideas to help them resolve basic problems beyond the legal advice you provide.

**4. Approach pitch meetings as a value-add conversation, not a sales call.** Clients no longer have the time, patience or tolerance to hear attorneys recite their curriculum vitae during pitch meetings without consideration of whether the attorneys' expertise is in alignment with the client's needs. The preferred approach to business development meetings in 2023 is to use your presentation time to uncover client needs. Then follow up with a deliverable that allows you to meaningfully demonstrate your ability to address those needs. Applying the Pareto principle of actively listening 80% of the time and speaking only 20% of the time is critical for these meetings.

A recent business development success started with a pitch meeting involving attorneys from a cross section of the firm. The meeting was conversational in tone, guided by a series of prepared questions focused on the client—not on the firm. Before the meeting, the relationship attorney gained buy-in from the client's general counsel on the meeting format. The client appreciated the opportunity to have a two-sided discussion rather than passively listening to a prepared presentation about the firm's capabilities.

**Best practice tip:** There are six steps to effective business development meetings: 1) Have a clear purpose in mind and ensure client alignment with your purpose; 2) honor the time contract for the meeting; 3) ask authentic, open-ended questions; 4) listen and learn by acknowledging, rephrasing and summarizing the client's response and by making suggestions; 5) align your communication style with the client's by matching their pace, priorities and perceptions; and 6) agree on next steps together with the client and own the next step to be sure that it happens.

**5. Add value in nontraditional ways.** It is important to remember that clients are people, too. Like all of us, they have professional goals and personal needs beyond the legal matters you are handling. Getting to know the individuals with whom you regularly interact can uncover a wealth of opportunities to add value for them personally, including opportunities to help them shine in the eyes of their superiors and teammates.

One of the nontraditional ways an attorney recently added value for a client was by assisting one of its employees with landing a role at the firm after the employee was unable to relocate to continue her position with the client. This went a long way with the client and was also a win-win for the firm, which gained the employee's insights into the client's internal processes and practices as a result of hiring the employee.

**Best practice tip:** When it comes to adding value for clients, think broadly and outside the box. At its core, strengthening client relationships is about making a client's life easier and showing that you care, and this can occur in a variety of ways. Great clients take care of their people, and client feedback increasingly shows that clients expect their outside law firms to also treat their people well—from the administrative assistant to the legal and business executives. Look for opportunities to help solve problems affecting both the business and its people. Ask your individual client contacts about their performance goals, bandwidth gaps, how they are evaluated and how you can help them meet their performance targets.

**6. Offer limited services at no cost.** Applying a loss leader strategy can provide clients with limited, but meaningful, work product and pave the way for additional work opportunities for you and the firm. One attorney applied this approach by introducing a client to a colleague who specializes in contract lifecycle management (CLM) to discuss CLM in the context of the client's processes and culture. The colleague suggested specific steps the client could take to gain more value from its CLM vendor and provided a brief assessment of the client's CLM system at no cost. Soon after this gesture, the client reached out to the attorney to inquire about the firm's

capabilities in several additional areas, which ultimately resulted in four new engagements that were handled by additional firm colleagues.

**Best practice tip:** Attorneys see the most success with business development when they focus on understanding the client's problems in the context of the client's culture and when they seek opportunities to collaborate with colleagues. Identify client needs that are important but that you may not be able to resolve yourself, and then connect the client with colleagues who can.

**7. Ask clients about additional opportunities to add value.** A discussion of value should be a staple in every client conversation. According to the Wicker Park Group, a consulting firm focused on client service, 94% of client feedback interviewees brought up the concept of adding value as a determining factor in outside counsel selection in 2020—an increase of 20% in the last decade. Don't miss the opportunity to ask your clients how they define value, then deliver accordingly. Our clients have cited invitations to meaningful events and partnering to advance diversity, equity and inclusion (DEI) goals as important value-adds, which we have been able to deliver on quickly and meaningfully.

**Best practice tip:** When a client gives you specific suggestions for adding value, implement them immediately. It's an easy lift to add client contacts to the firm's database so they begin receiving invitations to events and thought leadership. Also look for unique events that align with the client's business, industry and values, and extend invitations to those events. Leverage the firm's DEI resources to partner with clients on diversity-focused internships, mentoring and other initiatives.

A touchpoints strategy begins with a thorough understanding of the client, its people, processes, products, customers and the context in which they all operate. This understanding allows identification of key client touchpoints where your law firm expertise and resources can provide value. This kind of focused, personalized client activity becomes the basis for strong, trust-based, reciprocal client relationships, which in turn power a firm's prosperity.