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Leveraging Meaningful Touchpoints to Grow Your Business

Client Care Corner

WRITTEN BY

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Troutman Pepper's Client Care team regularly coaches our attorneys on strengthening client relationships as a strategy to grow their business. Our coaching emphasizes that successful business development prioritizes building relationships, making connections, and adding value through several meaningful touchpoints. This personalized approach is more impactful than throwing a fishing pole into the vast sea of RFP solicitations and blind pitches and hoping that something bites. Sustained, meaningful touches with clients are key to building the rapport, trust, and stickiness 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 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.

A common marketing principle is that it takes seven to nine meaningful touchpoints with a prospect or client before they decide to give you work. This article demonstrates how a Troutman Pepper attorney, with coaching from the Client Care team, applied the meaningful touches principle to a key client relationship over nine months in 2021 — and the impressive results of her efforts. It also highlights best practices for other attorneys who want to better serve clients and increase their work through sustained, meaningful contact with clients.

Nine Meaningful Touches

Touchpoint 1 – February 2021: Following some significant corporate changes, the client invited its outside law firms to discuss the client relationship and the client's priorities. Troutman Pepper used the meeting as an opportunity to plant seeds for follow-up discussions with the client about our Client Care and Innovation departments' feedback and value programs.

- **Best practice:** When meeting with clients about their goals and priorities, use questions to demonstrate intellectual curiosity and uncover client needs, actively listen to the client's responses, and 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.

Touchpoint 2 – May 2021: Troutman Pepper participated in a virtual summit for the client's outside law firms. Each firm was asked to choose two to three questions to address during the summit. Troutman Pepper presented on COVID-driven practice trends and legal tech tools and explained the practical application of the topics.

- **Best practice:** When you have an opportunity to demonstrate thought leadership 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.

Touchpoints 3 & 4 – June-July 2021: The Client Care and Innovation teams presented a menu of value offerings to the client, including a web-based portal, mobile app, financial dashboard, and attorney assignment software that enables clients to track the diversity of attorneys staffing their matters. The client remarked that Troutman Pepper's technology offerings are a standout among other law firms they have worked with.

Following that initial presentation, the Client Care and Innovation teams met with the client for more in-depth conversations about innovation and technology solutions – a billing narrative analytics program, financial dashboard, and web-based and mobile apps – and to determine which of these solutions would be most valuable. Then, the firm designed a prototype outside counsel scorecard the client could use to evaluate all outside counsel and best practices for deploying the scorecard.

- **Best practice:** Troutman Pepper's value programs and technology solutions are a clear differentiator for the firm in the market. Attorneys should actively seek opportunities to promote 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.

Touchpoint 5 – August 2021: Troutman Pepper hosted two business development meetings between the client and partners from a cross-section of the firm to begin discussing how the firm could meet the client's legal and business needs and add value to the relationship. The meetings were conversational in tone, guided by a series of prepared questions focused on the client – not on Troutman Pepper. Before the meeting, the 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 listen to a prepared presentation about the firm's capabilities.

- **Best practice:** 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.

Touchpoint 6 – September 2021: At the client's request, the relationship attorney assisted one of its employees with landing a role at Troutman Pepper after she was unable to relocate to continue her position with the client.

- **Best practice:** 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 through a variety of forms. 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 through the legal and business executives. Look for opportunities to help solve problems affecting both the business and its people.

Touchpoint 7 – September 2021: Troutman Pepper met with the client to discuss contract lifecycle management (CLM) in the context of the client's processes and culture. The relationship attorney introduced a colleague at the firm who specializes in CLM who suggested specific steps the client could take to gain more value from its CLM vendor. Following the meeting, he then provided a brief assessment of the client’s CLM system at no cost.

- **Best practice:** Attorneys see the most success with client development when they focus on understanding the client’s problems in the context of its own culture and when they look for opportunities to collaborate with one another. Identify client needs that are important, but that you may not be able to solve yourself, and then connect the client with people who can.

Touchpoint 8 – September 2021: The firm presented a conflicts of interest CLE program to the client’s law department to help the client fulfill its commitment to provide free CLE credit for its attorneys.

- **Best practice:** Helping your clients shine in the eyes of superiors and teammates is one of the best ways to add value. Ask clients about their performance goals, bandwidth gaps, how client representatives are evaluated, and how you can help them meet their performance targets.

Touchpoint 9 – October 2021: The Troutman Pepper relationship attorney met with the client’s regulatory and environmental teams to discuss specific pain points and priorities for those teams. During these conversations, the client suggested several ways Troutman Pepper could add value and advance the relationship, including inviting the client to meaningful events and assisting the new legal operations director with advancing her goals.

- **Best practice:** 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.

Immediately after the completion of these nine meaningful touchpoints, the client awarded Troutman Pepper two new matters in November 2021. The firm already has earned significant revenue from the new engagements and has since been referred additional matters. Throughout the various touchpoints described above, and through more minor interactions occurring between these events, such as sending gifts to acknowledge milestones, the attorney prioritized building relationships, making connections, and adding value.

Meet Linda Sanders

Linda brings more than 25 years of legal industry experience to her role as Director of Client Care, including leadership roles in business development, continuing legal education, and family and juvenile court administration. She combines her formal legal training, program development, project management, and relationship management skills to deliver high-quality, high-impact results for clients and attorneys. Linda focuses on providing value to clients, developing creative and innovative solutions to client needs, and ensuring clients receive consistently excellent service.

Linda received her bachelor’s degree in English from Spelman College and her Juris Doctor from the University of North Carolina School of Law. She is an active member of the Legal Marketing Association.