

A RainToday.com Ebook

# The One Piece of Advice You Need to Earn Your Clients' Loyalty

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# The One Piece of Advice You Need to Earn Your Clients' Loyalty

*From 9 Experts on Professional Services Marketing  
and Client Loyalty*

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## Introduction

There's been a lot of talk lately about surviving this recession, and much of the advice is focused on marketing and selling to get new clients. While continuing to bring in new clients is necessary for a service firm's survival, so is keeping your current clients loyal to your firm.

And, your clients might be more likely to switch to a different provider than you think. In RainToday's *How Clients Buy: 2009 Benchmark Report*, we surveyed over 200 buyers of professional services and found that across service industries:

- Only **48% of clients are "very satisfied"** with their service provider
- **60% of clients would consider switching** service providers

Here's the data by industry:

Service Area	% of Clients "Very Satisfied"	% of Clients Considered "Switchers"
Management Consulting	45%	72%
IT Consulting or Services	52%	67%
Marketing / Adv. / PR	42%	63%
Training	43%	61%
Arch. / Eng. / Constr.	54%	54%
HR Consulting	43%	53%
Accounting / Financial Consulting	52%	52%
Legal Services	50%	52%

As the competitive environment continues to intensify, it's likely that other firms are marketing more aggressively to your own clients and, as this data suggests, a good portion of your clients may be open to having these conversations with your competitors.

It is much easier (not to mention more cost effective) to retain and grow your current clients than it is to continuously have to fill the pipeline with new prospects.

So, what does it take to build the type of relationships with your clients that keep them loyal and coming back to your firm year after year? To find out, we asked 9 experts in client loyalty this question:

*If you could only give one piece of advice regarding how to develop client loyalty: what would that be?*

Each expert provided his or her own piece of advice in the form of an article without knowledge of the other experts' responses. Similar themes emerged, including:

- Be up front with your clients and don't allow for surprises
- Get to know your clients' businesses and industries beyond the areas which you are currently exploring with them
- Develop personal relationships with your clients
- Be proactive with your ideas
- Get to know others in the client organization beyond your direct contact

Each response provides tips and tactics you can immediately apply to your own relationship building efforts.

So, without further ado, on to the expert advice...We hope you find this report informative and inspirational for your own client relationship building efforts. We encourage you to share this report with friends and colleagues who would benefit from the advice.

And remember, RainToday...Dark by Midnight.

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## Keeping Your Clients Loyal – 9 Questions You Need Answered

By Mike Schultz

“It’s great to learn, ’cause knowledge is power.”

- Schoolhouse Rock

The purpose of this article is to answer the question, “What’s the one thing you should do to keep your clients loyal?” In well-established research, such as *The Service Profit Chain*<sup>1</sup> and *How Clients Buy*<sup>2</sup>, we learn that the more value you deliver, the more satisfied your clients will be. The more satisfied they are, the more likely they will be to stay loyal to your firm and refer other clients to you.

Makes sense, but this isn’t the whole story.

At the Wellesley Hills Group, we recently conducted research for a client on how often their past clients wish to be contacted by their firm.

An actual conversation with one of his past clients went something like this:

*John Doerr:* I am calling for Smith & Jones. Bill Smith did some work for you in the past and I am looking to find out the best ways for him to keep in touch with you.

*Client of Our Client:* How is Bill? I remember the work he did for us. His approach was so unlike anything we usually get. He was thoughtful, asked great questions, and actually changed what we were looking for. In the end, his suggestions made a huge difference for us. Very valuable.

*John Doerr:* Bill is doing great.

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<sup>1</sup> Heskett, James L., Thomas O. Jones, Gary Loveman, W. Earl Sasser, Leonard A. Schlesinger, "Putting the Service-Profit Chain to Work," *Harvard Business Review*, Vol. 72, No. 2 March - April 1994, pp. 164-174.

<sup>2</sup> Schultz, Mike, Doerr, John, *How Clients Buy: Benchmark Report on Marketing and Selling Professional Services from the Client Perspective*. RainToday.com. 2009.

*Client of Our Client:* Good to hear that. You know, I had forgotten about how good his work was. Too bad you didn't call last week. I just awarded a major assignment that was right up Bill's alley. I'm so busy right now. I have trouble remembering things from last week, let alone last year. The engagement came up, and I called the company who I met with most recently. They were in two weeks ago. Too bad for both of us, Bill probably would have been a top choice. Tell him to give me a call soon.

The client of our client got plenty of value and was highly satisfied...but not loyal. Perhaps one of the worst messages a professional can hear is that a client of theirs had need, had money, and awarded a deal to *someone else* for any reason. The reason in this situation was that our client fell off of the radar screen of his client, and thus he lost the deal.

If you want to keep your clients loyal, you need the answers to nine questions—some focused on your clients' perception of your *value* and some focused on your clients' perception of your *differentiation*.

**Five questions focused on value:**

*Question #1:* What *value* do clients perceive regarding our general category of company and services?

Perhaps your clients value that you are a diversified marketing company, not just a website firm. Or, that you're not just an accounting firm, you're a consulting firm as well. Or, that you are a specialist in XYZ, not a generalist. Perhaps they value that you are a family business versus a corporation. How they perceive your type and category of company will resonate with many buyers.

*Question #2:* What is the *value* clients perceive regarding us as a firm?

You might find that clients value your innovation and don't care as much that you're periodically unresponsive. Or, that they value your client service excellence, but your technical reputation doesn't matter quite as much. Maybe there are areas they *don't* value or where you are falling down in your delivery. (Good to know because if you want to keep clients loyal, you'll have to do something about it.)

*Question #3:* What *value* do clients perceive regarding the specific services we offer?

Armed with this knowledge, you will know what's working for clients, which services you offer that are the strongest, and where you deliver the best value. You might also learn that your clients don't even know you offer particular services. When we ask this question in our client research, we often find the client wants to know more and is "Surprised I haven't been with them all these years in that area as well." Powerful stuff that not only gets you more work, it keeps competitors at bay.

*Question #4: What value do clients perceive in solving the specific problems they currently have?*

We all have problems, but not all problems are created equally. Perhaps in a collection of 20 problem areas a company has, only three of them are to-do-list worthy. If you know the problems and issues—and which are most important—you can help the client tackle them. In our initial story, our client didn't even know about the particular challenge that caused the buyer to hire someone else. If he did, he likely would have won the work.

*Question #5: What value do clients perceive they might get if they could solve certain problems or accomplish certain things that they aren't focusing on right now or might not see as priorities?*

The best service providers help their clients make a better future—a future they may not have even known was possible. By helping clients solve problems they didn't know they could solve, and making improvements they didn't know they could make, service providers score higher on satisfaction (that, as we mentioned, is an indicator of future loyalty). They get the off-the-charts, surprise-and-delight, would-never-use-anyone-else effect.

**Four questions focused on differentiation:**

*Question #6: What different options do clients perceive they have regarding different categories of companies that can help solve problems or achieve goals?*

Sometimes it doesn't matter as much which specific companies your client might view as other options. It's important to know the types and categories of companies offering services in your area. Perhaps you're a management training company, with a core set of services in classroom training. You need to know if your buyers are considering e-learning providers—and how to position yourself against them as a competitor category—or you may find yourself losing business.



*Question #7: What different options do clients perceive they have regarding specific companies that can help them solve problems?*

Suffice it to say, if you've got competitors, you need to know your distinctions, advantages, and disadvantages when compared with them. If another firm can entice your clients with their siren song, and you don't have a compelling response, loyalty can suffer.

*Question #8: What different options do clients perceive they have regarding specific services available to help them solve problems?*

There are lots of ways to skin a cat<sup>3</sup>, and competitor companies are working all the time to create new and innovative services to solve problems. Whether or not they're new and innovative may be up for debate, but it doesn't matter. If your clients *perceive* them to be new, innovative, and valuable—you need to prepare for comparison. Of course, you could get ahead of the curve and offer your own new and innovative services, and leave it to your competitors to scramble to keep up.

*Question #9: What different options do clients perceive they have regarding other ways to solve problems, such as internal staff?*

You may need to position your services against internal delivery by client staff as strongly as you do competitors. Now take care, it's a dangerous game setting up to compete with the client. Do that at your own risk. For most, focusing on the delivery of the best value possible is the best way to keep work headed your way versus being in-sourced. Then again, perhaps it's a natural evolution to move the work internally. If so, help the client get the most out of that process, as you can win client business here as well. (Think technology transfer services.)

It's tempting to try to come up with a silver bullet answer to keeping your clients loyal. Folks like business author and strategist Fred Reichheld have advanced the idea that there's a correlation between how strongly someone would be willing to recommend you and how likely they are to be loyal. Great research, but I think you need to know more than that, like who recommends you for which services, for what reasons, and against which other available

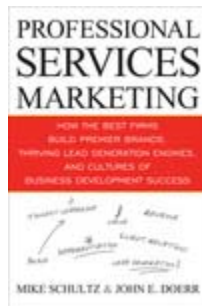
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<sup>3</sup> No cats were harmed in the writing of this article. We love cats, skin and all.

options. Armed with the answers to these questions, you'll have all the ammunition you need to keep your clients loyal.

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Order your copy of Mike's new book, *Professional Services Marketing: How the Best Firms Build Premier Brands, Thriving Lead Generation Engines, and Cultures of Business Development Success*

## Achieving the Highest Level of Loyalty

By Andrew Sobel

I was once in the midst of a long-term project with a CEO who suddenly received an attractive offer to sell his company. After several weeks of negotiations, it appeared the deal would go through. That morning my client pulled me into his office for a talk. I was, in truth, a bit nervous: the company owed me some money for past work, and we had a signed contract for consulting services that extended several months into the future. A change of ownership could throw everything into disarray.

“Andrew,” the CEO began, “I just want you to know that if this deal goes through, I’ve arranged for you to be paid for the work you’ve already completed—I don’t want that to fall through the cracks, which it might; I’m going to ensure that you are treated fairly.” He then added, “I have already spoken to the chairman of our new potential owners about how much you’ve helped us and suggested he meet you to see if you could be a resource for the combined entity.” I breathed a sigh of relief and thought to myself, “Wow, this guy is sticking up for me—he’s loyal!” In truth, it was a wonderful feeling.

When I thought back to the history of my relationship with the CEO, I realized that I had devoted a lot of personal time to helping him develop and implement his strategy—which he recognized—and also gone to bat for him in other ways on several important occasions. Not surprisingly, he was reciprocating.

### Understanding Loyalty

But what is client loyalty, really? The word “loyal” shares with “legal” a common root: In medieval times, common citizens were legally bound to their lord or king through a formal declaration of allegiance. Unfortunately, despite my best efforts, very few of my clients have made legally binding professions of undying loyalty to me.

During the course of researching my books on professional-client relationships—most recently while working on *All for One: 10 Strategies for Building Trusted Client Partnerships*—I have had the chance to interview over 100 CEOs and several hundred other C-level executives about their most trusted relationships. It is clear that there are three levels of loyalty that you can build, each of which builds on the previous one. These are:

1. Expertise Loyalty

2. Trust Loyalty
3. Reciprocity Loyalty

### **Expertise and Trust Loyalty**

The first level of loyalty is based on your expertise. A client will go back to you because he or she feels you are the best—or one of the best—at what you do. This is a somewhat tentative loyalty, however, because the client may well meet someone who appears to be more expert than you are, and switch to them.

Loyalty increases when you have taken the time to get to know your client as a person and become deeply familiar with his or her organization and strategy. Personal and professional trust develops, and you are no longer just another expert. You may enjoy trusted advisor status with your client, and there will be a high degree of loyalty.

### **Reciprocity Loyalty**

The third and highest stage of loyalty, which I call “reciprocity loyalty,” occurs when you’ve truly gone the extra mile for your client—when you’ve done something important that is clearly in their interest and not in yours. You may have given them a break on the pricing of a critical project, at the time when your client just didn’t have the budget; or perhaps worked through several weekends to help them prepare for a major presentation or to finish an important program. One major bank I know dramatically increased loyalty with a corporate client when it agreed to sell a bond position it held in the client’s bonds and therefore restore liquidity to the market. They gave up profits they could have earned by keeping the bonds longer, but the action was extremely helpful to, and actually essential for, the CFO’s balance sheet restructuring plan. The bank has now had this corporation as a client for ten years—the client has never forgotten.

This third type of loyalty is actually stronger than you might think. Early on in our evolution, humans learned to practice what scientists call reciprocal altruism. In other words, the attitude was “I’ll share my deer meat with you this week, if you share yours with me next week.” People who shared resources were able to out-produce and outlive those who didn’t. Reciprocity is hard-wired into our DNA.

In order to work properly, reciprocal altruism necessitated the development of a number of specialized abilities, such as the ability to detect cheaters and to

identify real altruists. Research has shown, for example, that we can intuitively distinguish between someone who is faking altruism and someone who is sincere. Interestingly, we have a better recall of known cheaters' faces than of altruists' faces—a tribute to the extreme necessity of ferreting out freeloaders. The desire to pay back those who have helped us, in short, is very, very strong.

\* \* \*

In summary, think about moving through three, ever-stronger levels of loyalty with your client:

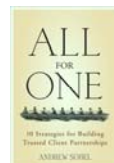
1. Expertise: "I use him because he's the best—he's terrific at what he does."
2. Trust: "She's great at what she does, knows me and my organization well, and I trust her completely."
3. Reciprocity: "He has always gone the extra mile for me and my organization."

Loyalty is most enduring and permanent when you reach level three, but even then, most clients will tell you that it must be continually re-earned. If you don't continue to add value to them and their business, and demonstrate that you deserve their trust, the loyalty will diminish or even disappear.



**Andrew Sobel** is a leading authority on client relationships and the skills and strategies required to earn enduring client loyalty. Andrew is the author of the newly published *All for One: 10 Strategies for Building Trusted Client Partnerships* (John Wiley & Sons) as well as the business bestsellers *Clients for Life* and *Making Rain*. He has also written over 75 articles on building long-term relationships, and contributed chapters to four books on leadership, strategy, and marketing. His clients include many of the world's leading services firms such as Booz Allen Hamilton, Bain & Company, Ernst & Young,

Citigroup, Towers Perrin, Experian, and Lloyds Banking Group. He spent 15 years at Gemini Consulting, where he was a Senior Vice President and Country Head, and for 13 years he has headed his own consulting firm, Andrew Sobel Advisors. He can be reached at [andrew@andrewsobel.com](mailto:andrew@andrewsobel.com).



Check out Andrew's new book, *All for One: 10 Strategies for Building Trusted Client Partnerships*

## How to Be Invaluable

By Jill Konrath

How can you possibly generate client loyalty in today's crazy business environment? It's darn near impossible when your services or products can be copied in a nanosecond, then offered at cheaper price points. Even if your firm does have state-of-the-art capabilities or unique methodologies, prospective clients believe this lead is only temporary.

There's only one way to have loyal clients today. You, yourself must be the differentiator. What I'm talking about is way beyond "liking" or "respecting" you. Your clients must find you so valuable that they'd willingly pay a premium for your offering—even when they're under intense pressure to reduce costs.

How can you make yourself invaluable? First of all, it doesn't happen overnight. Instead, it takes a dedicated and prolonged effort on your part to develop the knowledge, skills and relationships required to make it happen.

- **Deepen and Widen Your Expertise:** Become a student of your profession, constantly looking for ways to gain additional knowledge and skills that can enhance your value. Read the latest books, listen to webinars and teleseminars on topics relevant to your business, and attend conferences to further your professional development. Be constantly learning from others in your field.

Learn more about what happens upstream and downstream from your expertise. In my consulting practice, my goal was to help salespeople shorten time to revenue on new product launches. But, my success was predicated on deliverables from marketing—so I had to widen my knowledge base. The more you know, the more invaluable you become.

- **Search for Problems and Opportunities:** Once you understand your client's goals and objectives, your job is to help their company achieve them. Keep your eyes open for obstacles and bottlenecks that may create problems, cost additional money or slow things down. Look for redundancies and duplication of effort. Constantly be asking, "What might get in the way of my client's success?"

Watch for overlooked opportunities too! Sometimes your clients are myopic in their vision of what's possible. A plan has been set in motion

and they're focused on implementing it. In the process, they may totally miss opportunities that only an outsider can see. The more astute you are in this area, the more invaluable you become.

- **Bring Ideas and Insights to the Relationship:** Adopt your client's goals and objectives as your own. Keep asking yourself, "How can I help my client be more successful? What will it take to achieve their goals?" By challenging yourself with these questions, your brain starts making connections that were impossible before. Take these fledgling ideas and make them better.

Then contact your client, with this message, "I've been thinking about what you're trying to achieve this year. I have some ideas I'd like to bounce off you." The more robust and creative ideas you bring to your client, the more invaluable you become.

- **Challenge Your Client's Thinking:** Your clients need you to do more than just "service" their needs. They want you to bring all your knowledge, creative genius, and vast experience to the relationship. If you see pitfalls in their plans, speak up. If you see the potential for unintended consequences, raise a question. If you feel like they're thinking too small, stretch their visions.

As an outsider who is not enmeshed in the corporate culture, you see things that they can't. As an expert who works with multiple organizations, you have experiences they don't. The more provocative you are (albeit graciously and with positive intent) the more invaluable you become.

- **Suggest Appropriate Resources:** As a continuous learner who's always searching for new ideas, strategies, and processes, you will invariably come across resources that your clients would find helpful. When you read a good article, ask, "Who else might find this interesting?" When you meet talented individuals, make sure to get their contact information.

What's essential is for you to consider yourself as a resource broker. When your client calls you for advice first because you're a wealth of information, you've become all the more invaluable.

In short, being invaluable equates to customer loyalty. You'll never lose a client who calls you first when there's a problem or seeks your guidance when

making business decisions. And, the best thing is, that being invaluable is entirely within your control. It's not dependent on the company, the economy, or competitors. It's all about *you* and who *you* chose to become.

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**Jill Konrath**, author of *Selling to Big Companies*, helps sellers crack into corporate accounts, speed up their sales cycles and win big contracts. She's a frequent speaker at annual sales meetings and association events.

For more articles like this, or to bring Jill into your company, visit <http://www.SellingtoBigCompanies.com> or call 651-429-1922.



## Your Highest Priority: Building Client Loyalty by Delivering Superior Service

By Michael W. McLaughlin

If you're like most professionals, you'd rather sell follow-on work to an existing client than chase after an entirely new sales opportunity. After all, you're familiar with the client's business issues, and you know how to work together. For the same reasons, extending the relationship makes sense to the client, too.

Your strategy for building those enduring client relationships probably includes at least these two basics: First, you align your practice with the right clients. And second, you have a relationship plan, which guides your activities as you (hopefully) extend your influence within the client's organization.

### What Matters Most

Even if you identify the right clients and develop great relationship plans, that's not enough. If I were to give you one piece of advice for building client loyalty it would be this: Remember that nothing impacts the quality of your client relationships more than how you deliver every part of your service.

Sadly, many service providers do a masterful job of selling, only to flame out when the actual work begins. I know one consultant whose team was charged with helping a client kick off a major initiative. After opening remarks by the client CEO, the audience broke into seven "affinity" groups, each assigned to a consultant-facilitator.

The seven groups formed their circles and waited for direction. Unfortunately, four of the seven consultant leaders had arrived just in time for the meeting, and they stared blankly at their affinity groups. The clueless leaders checked their preparatory material, only to realize that their instructions consisted of four bullet points outlining the general objectives of the meeting.

Several hours of chaos ensued. Three weeks later, the client re-launched the project with another firm. If the consultants' execution of the project had matched the quality of the work they did during the sales process, it's likely that they would still be working with the client.

Obviously, you need a workable plan and the right skills to tackle any client project. But here are four other ideas to help you make sure your projects

build the lasting client relationships you want.

### **1. Get Real about Expectations**

Many service providers boast that they will "exceed client expectations." Few clients believe the claim, but it's a sales phrase that they see and hear way too often. The first problem with this claim is that client expectations are hard to define and even harder to measure. Asserting that you will exceed your client's expectations presupposes that you know what those are, which you probably don't. The client may not even know, so how will either party figure out if you succeeded?

Instead of promising the moon, define a baseline of value you plan to deliver and then meet *that* expectation. If, in the end, you do exceed the client's expectations, let the *client* tell *you*. It's not for you to say in any event. You risk disappointing clients and damaging relationships if you tell them that you'll exceed expectations and then fail to live up to that (or any other) promise.

### **2. Embrace Dull**

You should apply the old carpenter's axiom "measure twice, cut once" to your plans for every client project. You want is to have such a well-conceived plan that everyone knows just what to do and when to do it. When it comes to client work, "never a dull moment" is not what you are aiming for.

Naturally, there will be unwanted excitement, as much of what happens over the course of a project is unpredictable. Your job is to try to predict as many of those events as possible *before* the project gets rolling.

At the very least, you should devise a "Plan B" for dealing with potential uncertainties, such as project delays or executive turnover. But take your planning further. Think about Plans C, D, and E (up to and including a "doomsday" scenario if you are so inclined). Ask yourself five to ten "what-if" questions for each plan you devise.

What would you do if your project sponsor was fired, or the client project manager was out sick for a month? How would you manage if the client cut the team size in half part way through the project? What if your assumptions about your project approach turn out to be wrong?

The questions you ask will vary with each project, but you get the idea. Focus on your plan early, and then work that plan efficiently from the beginning to

the end of the assignment.

### **3. Manage Surprises**

Every now and then, a project works without a hitch. Usually, though, you'll have bumps along the way. Try to anticipate these detours, but don't be shaken if something unanticipated crops up.

How you manage surprises has an enormous impact on the success of any project and client relationship. You have two choices for how you communicate surprises to clients. Think of it as a Band-Aid you need to remove: You can rip it off quickly, enduring all the pain at once; or you can tug it off slowly, prolonging the agony.

It's best to give clients bad news as soon as you know about it. If you have a budget overrun, for instance, get all of the issues and implications out at one time. Show your client the whole picture and explain what you need.

No one likes bad news, but the way you handle adversity is vital to your client relationships. As the *I Ching* (the Chinese Book of Changes) puts it, "The event is not important, but the response to the event is everything."

### **4. Understand Your Impact on Others**

For a project to be successful, you must create a positive impact throughout the client's organization, not just with the project sponsors. As an outsider, expect some people to welcome your presence and others to be wary. Don't take it personally in either case.

You've probably heard stories of service providers who alienate clients by behaving badly. One former consultant was notorious for her condescending attitude toward everyone in the client's organization—except those in positions of power. Eventually, that behavior led this individual right out of the consulting business.

Even with a perfect plan, your behavior towards others will always drive your overall success. Of course, you must get your work done with the pressure of deadlines, but your client relationships won't get off the ground if clients think you are a jerk. Sometimes, it's hard to know the impact we have on others, so be sure to ask your colleagues and clients for guidance.

## The Key to a Relationship Strategy

Establishing a mutually productive relationship with a client demands that you pay attention to many complex activities, including bringing useful ideas to your client, building a network of supporters, and maintaining your visibility. No matter how well you perform these activities, none of it will matter if you cannot execute your work with finesse and develop the client relationship along the way.

You may bring the best ideas to your clients, but if you're unable to deliver on those ideas, expect them to find someone who can. That's why superior service delivery is the essential ingredient in a successful client relationship strategy.



**Michael W. McLaughlin** is a principal with MindShare Consulting LLC, a firm that creates innovative sales and marketing strategies for professional services companies. He's the author of *Winning the Professional Services Sale* (July 2009), and the co-author of *Guerrilla Marketing for Consultants*. His newsletters, *Management Consulting News* and *The Guerrilla Consultant*, reach a global audience. Before founding MindShare Consulting, he was a partner with Deloitte Consulting, where he served clients and mentored consultants for more than two decades.

## Client Loyalty: How to Keep Happy Clients Who are Delighted to Pay Their Bills

By Larry Bodine, Esq.

### *A Perspective from Law*

Your best client is the No. 1 target of competing lawyers. Be savvy and hold onto your best clients—as loyal fans who recommend you—by using a special trick employed in the retail world: Great customer service.

It's a trick used by Nordstrom, L.L. Bean, Trader Joe's, Starbucks, and JetBlue Airways, all listed in Business Week's Top 50 "[Customer Service Champs](#)," but there's nary a law firm on the list. If USAA (insurance), Edward Jones (brokerage), and National City (banking) can use great customer service to keep devoted customers coming back again and again—so can lawyers.

### **Giving Great Customer Service**

I have been interviewing clients about what they like and don't like about their lawyers. It's easier than you think to provide great customer service, and here's what it looks like for lawyers:

**Be responsive and give clients what they want.** Return all calls within 24 hours. The biggest complaint about lawyers is that they don't return calls. So, if they send you an email, a letter, or phone call, *just respond*. If you can't do it, make sure your legal assistant or an associate gets back to them right away. And when they ask for something—like updates in the middle of cases or transactions, *give it to them*. You know the legal services that they *need*, but loyal clients get what they *want* from their lawyers.

**Find ways to save the client money.** Suppose your client is one of dozens in a catchall list of defendants in a lawsuit, and you know they don't belong in the case. You could file a motion to dismiss, but that would take time and cost money. Or, you could call the adverse lawyer, and ask him to voluntarily dismiss your client without prejudice. Then you call your client and tell them (a) that you got them out of the case and (b) you did it with a phone call. The client will be thrilled.

**Be civil, don't be a scorched-earth lawyer.** Clients basically want sound advice. One client told me that one of the better features of his lawyer was that he wasn't strident or overly aggressive. Clients want somebody working

for them who is reasonable and measured, and won't lead the client down an expensive path of pointless battles. Sure, there are "pit bull" lawyers who fight everything all the time, but nobody likes them, *especially not clients*. One client's interrogatories weren't answered promptly and he wanted to bring a motion for sanctions against the adversary lawyer. His lawyer said, "I know the attorney and I can talk to them." He just saved his client a pile of money.

**Tell clients way in advance of costly new developments.** "No surprises" is the rule. One lawyer spotted an issue in a case that would require an expensive expert. He called the client 60 days in advance and said he'd collect C.V.s and give the client some options. The client loved it because she was given time to make a decision and information to give input on the case.

**Don't turn in bills that will start an argument with your clients.** Savvy lawyers submit bills promptly, make them fit the client's preferred format and demonstrate that not a minute was wasted. These are the lawyers who get paid immediately and in full. Clients are afraid they'll get bamboozled by padding or needless churning of time in a lawyer's bill. That's why an industry of auditors has grown who meticulously evaluate every 1/10 of an hour in a lawyer's bill. Clients hate to hassle lawyers over their bills as much as the lawyers hate being hassled. But if you're known as a lawyer whose bills never create issues, the client will be delighted.

**Answer quick questions for free.** Lawyers with loyal clients will answer their quick questions for a case citation or a summary of a statute, even though they give away dozens of hours a year doing so. It's important not to charge the client and *state that fact on this invoice* so they are aware of it. The reward is that the client will remain with you forever and recommend you to other new clients. Contrast this with lawyers who charge two-tenths of an hour for reading a client's email. Clients of these lawyers feel they've been chiseled.

**Take a sincere interest in the client's business.** Visit the client, read the trade magazines that they read, and learn the lingo of the trade. This will impress clients and make you stand out. One client said his lawyer went so far as to get an advanced certification in the client's business and make presentations at the client's trade organization. "We like that a lot," the client said.

**Be a loyal lawyer.** Avoid asking clients to waive conflicts of interest, and don't take clients who compete head-to-head with the client. Remember that clients will Google their lawyers. If the lawyer has a website that says they defend trucking companies, but also have a plaintiff's practice of suing trucking companies, the client will notice. "When I see that happen, I quit using the

lawyer," a client said.

\* \* \*

Here's a list of tactics that clients *hate*.

**Routinely delegate matters to less-experienced associates.** If you are the attorney the client hired, they expect *you* to personally handle their matter. They don't like it when they discover a 25-year old associate did all the work and essentially was trained on the client's dime. It's quite different if the client assigns you an esoteric matter of law that's not in your expertise. If you tell the client you're delegating the matter to a partner who's an expert in the topic, and who can get the job done better than you can do it, they will respect that decision.

**Act annoyed when clients call and tell them you're so busy.** Remember that a call from a client is not an interruption; it's the reason you are in law practice. Sure, clients can be a pain in the neck and require excessive handholding, but do not show your irritation. If you tell a client with an annoyed voice that you are drowning in work, you've just made them feel unimportant. They'll be reluctant to call you again and will find a lawyer who is willing to listen to them.

**Take on too much work so that the client has to push you to get the case moving.** Business clients want their cases resolved quickly because to them, a legal matter is a business expense. Don't be the lawyer that clients have to stay on top of and feel they have to push to keep things moving ahead. Clients complain about these lawyers and avoid giving them new work. If you find you have several ancient matters that are dragging on forever, set up a meeting with the client and develop an action plan to clear them off your docket.

**Be aloof and avoid creating a personal relationship.** This coldness will hurt even the most experienced and skilled lawyer. What clients want is a personal counselor or a trusted business advisor—someone who makes it clear they *care* about the client. Rainmakers already know this, and play golf and go to sports events with clients, visit client offices to make "wellness visits," and invite clients to their homes for dinner. The clients love it and reward the rainmakers with new files and recommendations. Establishing a mutually productive relationship with a client demands that you pay attention to many complex activities, including bringing useful ideas to your client, building a network of supporters, and maintaining your visibility. No matter how well you perform these activities, none of it will matter if you cannot execute your work with

finesse and develop the client relationship along the way.

You may bring the best ideas to your clients, but if you're unable to deliver on those ideas, expect them to find someone who can. That's why superior service delivery is the essential ingredient in a successful client relationship strategy.



Larry Bodine

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A founder of Apollo Business Development (<http://www.ApolloBusinessDevelopment.com>), Larry Bodine is a team member of a consulting firm that trains attorneys on how to get more clients, and generate more revenue through:

- [Business Development Training](#)
- [Business Development Strategy](#)
- [Individual Lawyer Coaching](#)

Apollo conducts a group training session, meets one-on-one with lawyers to develop business development action plans and makes follow-up coaching calls. The approach has generated millions of dollars for Apollo clients.

The team also publishes a monthly online newsletter – ***Originate!*** – ***The Business Development Advisor*** – at <http://www.pbdi.org/originate>. The subscription newsletter presents practical, how-to advice on getting new business from attorneys and expert marketers.

And for live discussion of hot issues and breaking news, marketers in *EVERY* field are invited to join the LawMarketing Listserv at <http://www.LawMarketing.biz>. Visit the site to see the TV set showing what members are discussing. Members say it's the best marketing investment they've ever made – check out the testimonials at <http://tinyurl.com/ce9e2j>.



## Taming the Search-and-Switch Client: 3 Keys to Keeping Your Clients Loyal

By Jill Griffin

What if, this very minute, one of your best clients is on Google comparing you to the competition and contemplating a switch. Will your brand pass muster and prevail or get kicked to the curb?

That's the daunting scenario playing out countless times a day for most brands. Sadly, many firms are ill-equipped to address this big, new loyalty threat and they bleed high-value clients because of it.

Here's a quick look at three B-to-C search-and-switch remedies that professional services firms can learn from:

1. **Ace Your Buyer's Worth-It Test:** Your buyers are human calculators of sorts, constantly accessing your brand's worth against other choices. In a search-prone world, how do you consistently score a big "yes" on your client's worth-it assessment?

Job #1 is to define your buyer's next best alternative (nba) and trump it. Just ask Nick Swinmurn, founder of online shoe seller Zappos, who launched his company in 2000 thinking that his customer's nba was other online shoe sellers. Swinmurn soon realized the online shoe market was too small and that the Zappos customers' nba was a brick and mortar shoe store!

This revelation required Zappos to overhaul its business model and find innovative ways to deliver extreme customer value. Zappos did just that and in five short years after the company set its sights on bricks-and-mortar shoe stores as its customers' nba, sales skyrocketed from \$8.6 to \$300 million.

But pinpointing your buyer's nba is just half the battle. Job #2 is to identify your brand's most compelling worth-it message and then anchor it in the minds of prospects and buyers. Yet, many firms unwittingly commit worth-it suicide through one or more of the following communication traps. They:

- a. Flood customers with a ton of benefits rhetoric expecting them to sort through the rubble and figure out what matters.

- b. Operate on the flawed notion that clients are rational beings who cannot resist a sensible selling proposition
- c. Depend on clients to simply “read between the lines” to identify the brand’s worth-it benefits
- d. Complicate the worth-it message making it tough for clients to articulate it to others
- e. Think they know the benefits clients truly care about, when in fact, they do not

2. **Manage your Customer’s Switch-O-Meter:** Client switching behaviors are complex. That’s why the right metaphor can help you get a grip.

Think of a Customer Switch-O-Meter of sorts that resides in your client’s head. The needle on the meter constantly reflects the temperature of your brand in your client's head. It can swing from a cool, calm reading (lowest likelihood to switch) to hot, eruption prone reading (highest likelihood to switch). Your goal is to manage these dynamics and keep the client's attitude temperature about your brand as cool (i.e. positive) as possible. You do this by proactively managing your client's attitude with “drips.”

For example, when passenger Bob Emig’s Southwest Airlines flight suffered an arduous five-hour delay due to icy weather, the airline unleashed a flow of cool, loyalty-building drips to offset the hot, repressing ones. The pilot walked the aisles, providing constant updates and answering passenger questions. So did flight attendants.

When Emig returned home, the loyalty-building drips continued. A letter of apology from Southwest arrived within a few days, along with two free-round-trip ticket vouchers. Says Emig, “They gave me a gift, for all intents and purposes, to make up for the time spent sitting on the runway.”

3. **Keep your Brand Compellingly Different:** To keep clients from switching, your brand must consistently trump competitive comparison. The importance of this cannot be overstated. Yet, most firms do a lousy job at infusing their brands with compelling differences and instead manage innovation in an ad hoc way.

This is not the case at Amazon.com, a company which spends a lot of time looking ahead. Yet, while most firms are preoccupied with spotting the next big thing, Amazon founder Jeff Bezos offers

contrarian advice on scoping out new opportunities. Says Bezos, “It helps to base your strategy on things that won’t change....At Amazon, we’re always trying to figure that out....All the energy you invest in [these things] today will still be paying you dividends ten years from now.”

Whatever switch prevention remedies you pursue, make sure they are grounded in time-tested loyalty principles. With today’s big bias on “new,” it’s tempting to dismiss these fundamentals. As Willie Nelson croons, “It’s time to get back to the basics of life.” Search-and-switch remedies are no exception.

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**Jill Griffin** is known to her clients world-wide as The Loyalty Maker®. Since 1988, she has led Austin-based Griffin Group, helping firms around the globe build fierce loyal customers. Her clients include Microsoft, Dell, Toyota, Marriott, HP, Western Union, and Sprint. Jill’s newest book is *Taming the Search-and-Switch Customer*. Her previous book, *Customer Loyalty*, was named to Harvard Business School’s “Working Knowledge” list and has been translated into six languages. She is also the co-author of *Customer Winback*, which earned Soundview’s “30 Best Business Books” award. Jill’s books have been adopted as textbooks for MBA and undergraduate courses taught at the University of Texas, Northwestern, and other universities and colleges across the U.S.



Jill, who has also served on the marketing faculty at the University of Texas McCombs School of Business, serves on the Board of Directors for restaurant chain Luby’s Incorporated (LUB), a New York Stock Exchange company with 126 locations and 7,000+ employees.

Jill is a Magna cum Laude graduate, Distinguished Alumni, and member of the Board of Trustees of the University of South Carolina Moore School of Business from which she holds Bachelor of Science and MBA degrees in Marketing. An in-demand speaker, Jill keynotes conferences worldwide.

It’s never been easier to tame your search and switch customers! My book, *Taming the Search-and-Switch Customer: Earning Customer Loyalty in a Compulsion-to-Compare World* is chocked full of practical, easy-to-use steps, checklists and case studies that show you exactly how to tame! Use the Ten –Day Starter Plan on pages 244-245 to quickly get started putting into practice the hundreds of guidelines and examples outlined in the book. You can learn more about the book at <http://www.loyaltysolutions.com/taming-book/>

## Your Clients Need Cultivation—Now, More Than Ever!

By Ardath Albee

Marketing and selling to prospects in the world of B2B professional services is a long-term proposition. You must nurture each prospect throughout the buying cycle with custom emails and other communications.

Now, with sales cycles lengthening, it's even more imperative to keep the clients you have. That means instilling higher degrees of loyalty by cultivating each of your relationships.

The best piece of advice I have for doing this is to really listen and understand your clients' perspectives, needs, and goals and to communicate back relevant information. And you must do this in a coordinated, strategic, and consistent way for as long as your clients are clients.

### Your Clients, Their Needs

Today's clients are struggling to efficiently do more with less. Their jobs are increasing in complexity. Their company's objectives are shifting rapidly (and they are dealing with economic uncertainty). Continuously delivering additional value to your clients will increase their reliance on your expertise.

E-Newsletters, though a common client program, are simply not enough. The problem with newsletters is that they're general. They usually contain a variety of articles and updates about service offerings with the hope that every client will find something of value.

Instead, think about which groups, or niches, of clients have similar needs and create a cultivation strategy for each group or segment. Personalization—from the client's perspective—is the critical consideration.

To design a cultivation program, put yourself in your clients' shoes and ask questions like:

- What are my top priorities, and what do I need to know to solve them?
- What are my competitors doing that I need to take action about?
- Which industry trends are likely to impact my strategic goals and how can I harness the good ones and avoid the bad?

- How are companies like mine handling similar issues?
- What's shifted in the marketplace that requires an adjustment to the project I implemented last quarter with you?

The answers to questions like these will provide unending fodder for relevant articles. If some of these questions stump you, take the initiative to uncover hidden answers.

### **Understanding Your Clients' Perspective**

The trick to personalizing your program is to really listen and then to communicate back with your clients, demonstrating you're in sync with what they're thinking about.

Some options for enhanced listening include:

- Calling clients and asking them a few key questions—which also serves as a reinforcing touch point.
- Reading their blogs and industry expert's blogs—posted comments can also yield great insights.
- Following related conversations, and your clients, on Twitter.
- Monitoring questions asked on LinkedIn by people in similar industries and roles.
- Assessing the current articles and blog posts on industry portals.

In today's digital environment there's more information available than ever. It's up to you to devise a plan and use it wisely. Google alerts for keywords and your clients' names can also yield timely insights without a lot of effort. Create separate folders and rules that divert them from your inbox so you can scan the alerts when you have time and avoid an overflow of messages that interfere with your daily business responsibilities.

### **Your Cultivation Strategy**

Executing a cultivation program doesn't mean you must generate all of the content. You can forward along articles written by industry experts, links to topical blog posts and tell brief, and conversational stories about how clients like them are tackling today's challenges. Try to include tips and insights they can take action with, right now. The point is to make these communications helpful, conversational, relevant, and consistent.

Make your client cultivation program easier by creating a plan for execution. This can be as simple as creating a spreadsheet with a column for each month and a list of the types of resources you can include to address a client segment.

Customer Cultivation Plan			
Content:	Month 1	Month 2	Month 3
Articles by Me	Industry Trend Article - in answer to customer perspective question	Short Commentary - related to research and blog theme	Top Priority Article - in answer to customer perspective question
Industry Articles	Related Article Link - description + link	Research Report - description + link	
Blog Posts		Related Blog Post - description + link	
Customer Story	Customer ABC - how a customer like them is taking action		Customer Scenario - what it might look like for the customer to solve the priority
Event Promotion			Teleseminar on related topic - invitation to register

A client cultivation plan enables you to strategize how you'll address each market segment more personally. With a spreadsheet for each segment, you can paste in links to other articles or research materials as you find them, or cull them from your Google alerts. That way, when you're ready to sit down and write—or compile—your communications, you've got everything you need at your fingertips.

Depending on the size of your client roster, you may only need one cultivation plan. The key is to make sure every resource included speaks to client needs. You could choose to base each issue on a theme. Examples may include addressing a client priority one month and an industry trend the next. If you serve three different industries, but solve a similar problem in each, try creating three versions that use the same articles modified slightly for each vertical focus. Personalization and segmentation don't have to be difficult. Start small and refine as your company grows and your client composition shifts.

The articles you write don't need to be long. People are busy, so focus on giving them value quickly. A meaty article can be compelling in 500 words. Orient the article to deliver one really good tip or insight. During the months you don't include your own article, write an introductory commentary that tells your customers why you've sent them the links and perhaps a tip or two

on what to think about as they read the articles, blog posts, or research you've included.

### **The Cost of No Communication**

If you think creating a personalized program sounds like too much work, consider what can happen without client cultivation. The longer you stay out of touch, the greater opportunity your competitors have to get your client's attention. If you don't continually differentiate yourself, your clients can experience "sameness creep." When your clients no longer distinguish an advantage to working with your firm, you become expendable.

Even more importantly during times of fear and uncertainty, like now, your client's perception of their experience with you amplifies. If the experience is good, you win higher levels of loyalty. If the experience is bad, it feels even worse and their loyalty diminishes, fast.

### **Getting Started**

Creating a cultivation program for your clients is one of the best investments you can make to improve their loyalty to your firm. Get started today. Thinking about it is not the same as taking action. And, when you do, you may be surprised at the thanks you get—and the additional business opportunities that arise.



**Ardath Albee**, CEO and B2B Strategist of Marketing Interactions, Inc, helps B2B companies with complex sales increase and quantify marketing effectiveness by developing and executing interactive e-marketing strategies driven by compelling content. She empowers her clients to create customer-centric nurturing programs that leverage strategic story development to engage prospects until they are sales ready. Her clients experience results like an increased 375% in sales-ready leads in 8 months which translates into millions of dollars added to clients' sales pipelines. But, marketing isn't just about generating new demand. Ardath helps clients re-engage customers and build loyalty that adds longevity to customer lifecycles.

Visit her website at <http://www.marketinginteractions.com> and industry-leading blog at <http://marketinginteractions.typepad.com>, or email her at [Ardath@marketinginteractions.com](mailto:Ardath@marketinginteractions.com) to learn more.

## How to Retain Clients: Teach Them How to Be Loyal

By Sharon Drew Morgen

You're good. You go out of your way to serve your clients. Not only do you help them resolve their needs, but you give them extra services along the way—fixing a relationship here, offering sound advice there. And because you have become such an integral part of your clients' environments, you can honestly say you have become friends with some of them.

But the next job is given to a competitor. How did that happen? Was your work less than adequate? Did you slip up somewhere? Was the competitor much cheaper? Or was the client just stupid, swayed by some unknown criteria that ignored your brilliance, and didn't recognize all that you did for them?

The truth is, you don't know.

### Decisions Come from within the System

We'd like to think that because we are professional, likable, and smart, and because we deliver a good service, that our clients will choose us over and over again. Yet that doesn't always happen. It should, of course. But it doesn't. Why?

Let's begin by understanding what goes on within a client's environment.

Clients live within a system of people, policies, rules, historic decisions, personality issues, initiatives, and shared assumptions. All of these things create their current environment, and maintain it as well. Unless we are a part of this system through time, we aren't privy to the machinations of how these elements play out on a daily basis. Indeed, *they* often don't know either; it even takes a while for an insider to get on board and become a fully functioning part of the culture.

Here is a story that will give you an understanding of how deep the hidden, internal systems issues are, and how they can affect daily decision making:

I was doing sales coaching for a well-known European professional services company, helping a team of senior partners close some complex pieces of business. The group leader called, asking me to help with a sale they had already closed: Two years prior, my client had won the bid—worth \$30m—to develop an electronic banking solution for a



major bank, and were still waiting to begin the implementation.

My clients stayed socially involved with the C-level decision-makers and occasionally did small applications while they waited...and waited. And, in the interim, it cost the bank \$1b to *not* implement the solution. My client wanted help getting the bank to begin the implementation. It seemed so curious, especially when it was costing them so much.

I met with the CEO of the bank. He was smart and fun. In the meeting, I spent twelve minutes posing some facilitation questions. *It was these questions allowed the CEO to put several issues together in his mind for the first time:* There was a three-year-old problem with a union representative, left over from the previous CEO, which involved some unresolved personal issues. Until that problem was addressed, they couldn't move forward. The CEO realized he'd been doing a lot of unconscious workarounds, rather than dredging up the unresolved issues.

He agreed to hire a consultant to fix the problem and work out the Union issues. Within two months, my client was providing the banking solution.

It seemed so simple. And yet this very smart CEO had 'forgotten' the problem and made unconscious decisions that kept the problem in place. It took some

I told this story in London during a keynote, years later. A man in the audience stood up: "They must have been bad sales people or they would have discovered the union problem and solved it immediately."

From the back of the room came a familiar voice: one of the Senior Partners had flown from Brussels to surprise me. He waved his arm in the air, yelling: "I was one of the Senior Partners. And I disagree with the guy down in front. We knew the technology, we knew the business problem, we knew all of the "C" Level people, and we knew the managers and the users. We knew the banking environment. Trust me: there was *no way* to get to a three-year-old union problem from where we sat. Even the CEO didn't realize why he was making decisions around it. There was no path from 'here' to 'there' using conventional sales or consulting skills."

## How to Influence the System to Create Loyalty

To help our clients remain loyal over time, we have to help them decide how to do that by using *facilitative questions*. Here are some pointers:

1. *Instead of assuming that if you do a good job you'll garner loyalty, let the client tell you what they need from you.*

Pose these facilitative questions:

- a. What would you need to see from me through time, to be willing to choose me for future business?
  - b. How would I know that something that happened during our work together might need to be cleaned up? I'd be very interested in doing work with you in the future, and would like to stay on top of anything from your end that makes you less than happy.
2. *Early in your working relationship, let the client recognize and share the criteria they'll use to remain loyal to you through time.*

Pose these facilitative questions:

- a. How would you like us to be working with you so that we're always aware of the issues that might be cropping up from your end and can help you manage them?
- b. When it is time for you to be considering more consulting work, what would you need to see from me during this engagement to know that we'd be a good choice for future work?

We would like to think that because we do a great job, our clients will be loyal. But, the truth is, we have no idea what's going on in their environment that might bias their choices:

- Do they have a long standing relationship with one of your competitors?
- Is there a new merger happening that will determine their vendors?
- Do they have an internal group that usually manages solutions when they have time?

- Did one of the folks from the last implementation have issues with your work and not tell you?

Facilitate your clients in deciding how to choose you, and continue the dialogue over the life of your relationship. At the end of the day, if the client doesn't choose you, it doesn't matter how good you are. Teach them how to be loyal.



**Sharon Drew Morgen** is a visionary and thought leader in the field of decision facilitation. She is the author of New York Times Business Bestseller "Selling with Integrity" and several other books on a new sales model called Buying Facilitation, based on helping buyers make the range of internal decisions necessary to buy our services. Sharon Drew is a consultant, trainer, and coach.

Morgen's new book, *Helping Buyers Decide: How to sell with Integrity* is coming out in July.

## Client Loyalty as a By-Product of Firm Leadership

By Patrick J. Lamb and Nicole N. Auerbach

### *A Perspective from Law*

They say the true measure of leadership is the caliber of people who choose to follow the leader. This saying is particularly applicable in the context of client loyalty at law firms, but it is only one piece of a much more complex puzzle.

Real client loyalty is achieved when clients are truly comfortable with all of the people with whom they deal, not just the person responsible for managing the relationship. Clients must also believe their law firm shares their commitment to producing efficient, quality results.

### **Choosing Leaders**

To create these positive working relationships, everyone in an organization needs to sing the same song in the same key. This harmony results from great leadership, something lacking in most law firms.

Few law firms take into account the leadership and management skills of those chosen to run the firm. Fewer still distinguish between managers and leaders. Most simply take one of the firm's most powerful lawyers—one who typically earned that moniker by being a rainmaker—and tapped him (and it is, to be certain, almost always a him) for the role.

Little or no attention is typically paid to the level of vision the anointed one has, let alone his or her ability to play well with others in the sandbox, to motivate, to inspire, or to move the ball forward. The closest parallel is when an aging business owner puts his young son in the CEO role before the son has developed the skills needed to perform.

### **Trying Times**

The past decade has been a good one for law firms. Profits per equity partner have grown annually, frequently by 10% or more. Work has been plentiful. Management challenges have had more to do with growth or finding synergies between merged-firm cultures than anything else.

Since mid-2008, however, that has changed, and for the first time, managing partners have had their leadership mettle tested. The economy has nose-dived and clients have refused to accept the typical annual rate increases. For

the first time in many years, even perhaps, in the professional lifetime of many partners, revenues at most firms have declined on a gross basis. That the declines have, in many cases, been significant has only added institutional stresses testing the character of firms and the people who run them. In this uncertain and surreal environment, distinguishing between managing and leading has become imperative.

### **Management v. Leadership**

The highly respected business advisor Tom Peters describes the ideal leader as one who embodies the “Golden Leadership Triangle”: A talent fanatic, a visionary, and an inspired profit mechanic. In contrast, “Ninety percent of what we call management consists of making it difficult for people to get things done,” wrote famed management thinker Peter Drucker.

There is a story that was reported recently about the Managing Partner of one of the country’s largest law firms responding to the recent economic crisis by eliminating the free coffee in the lobby of the firm’s Chicago headquarters. This was the decision of a manager, not a leader. Managers have laid off thousands of talented lawyers in just the past few months, some of whom had only recently been hired. They are viewing the economic issues myopically. Managers see the economy and their client’s reaction to it as a problem.

On the contrary, leaders see the upheaval as an opportunity to reposition their firms, to attract new talent and to lure clients with the promise of something better, knowing they have the vision, skills and loyalty needed to deliver on the promise. George Bernard Shaw famously wrote, “Some men see things as they are and say why, I dream things that never were and say why not.” Managers ask why. Leaders ask why not?

### **Leadership and Client Loyalty**

Here’s where our “one piece of advice” comes in. If those running your firm are spending their time figuring out ways to extract more money from your clients for doing the same amount of work and creating the same value, our simple “piece of advice” is to revolt and find a true leader to run your firm—and quickly. Find someone who has a vision of where your firm can deliver greater value to your clients *and* generate profit at the same time. Find someone who believes in the Golden Triangle.

His or her (and please do think about women in this role) vision must include aligning your firm's economic interests with those of your clients. Doing so will allow your firm to do a number of things that will foster client loyalty. For example, if you develop a system of being paid based on outcome, your firm will need to leave the pyramid structure behind and use experienced people to work together. A pool of experienced people working on matters should yield even better results than an experienced lawyer delegating work to younger, less experienced lawyers.

Knowing what inefficiencies can be eliminated will benefit the client and enhance your productivity (and your profit margin). If the client is paying for a successful outcome, he or she is more likely to implicitly trust your decisions and staffing because of your shared economic interest in the outcome. Further, this eliminates a large headache for both you and your clients: They no longer need to review your time-based bills and nit-pick each quarter hour.

Fostering leadership that aligns your vision with your client's interests will result in several collateral benefits that are of real value to your clients and firm. If the firm is financially vested in the success it achieves for its clients, it will be inclined to train the people working for that client and use them repeatedly. That efficiency serves the firm and the client.

Once trust starts to develop, you may find yourself in a position to suggest additional projects where fees are earned only if results are obtained. Providing training to the client's employees in order to reduce certain kinds of lawsuits is one example. Under the traditional model, when training is offered, most clients like the idea but cringe at the cost. Yet if your arrangement is based on being paid if you reduce employment lawsuits by 20%, your investment in training the client is being paid out of proven savings. Your assistance becomes an investment for the client, and vice versa.

### **Win-Win Relationships**

The ways you—the person implementing the new vision—can build on this trust and your client relationships are limited only by your imagination. But if you operate from the premise that you should win only if the client wins (and that is always an important point of discussion with the client), the creation and enhancement of client loyalty is an inherent by-product.

In the end, you will be able to measure the true value of your leadership, not just by looking behind you, but also by looking beside you to see the caliber of

those who follow. Chances are, the numbers will be high, and the caliber will be higher.

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**Patrick J. Lamb and Nicole N. Auerbach** are two of the founding members of Valorem Law Group, LLC. Valorem is a business litigation firm built on the value proposition that complex business litigation can be handled successfully using non-hourly billing methods that result in budget certainty, alignment of economic interests, and a firm motivated to achieve the result sought by the client, all at a cost substantially less than hourly rate firms would charge.

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- **Free articles** by well-respected marketing, sales, and service business experts such as John Doerr, Patrick McKenna, Michael McLaughlin, Jill Konrath, C.J. Hayden, Bruce W. Marcus, and Charles Green on core topics in selling and marketing professional services.
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- **Premium content, templates, and tools** designed specifically for helping service providers to grow their firms.
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