

## FIRST MEETINGS WITH A PROSPECTIVE CLIENT

A prospective client has called you and would like to meet. They explain the issue that they are having and you agree to meet with them. It is your first time meeting with them. How can you best handle this important first meeting?

Surprisingly, a majority of first meetings do not advance to a paid engagement. The reasons vary widely and are often beyond your control. However, some reasons are well within your ability to influence the outcome. This article is about controlling for the factors that you can control to give yourself the best possible chance of landing the engagement.

### 1. ADOPTING THE RIGHT ATTITUDE:

**SET CLEAR OBJECTIVES:** Be clear about what you want to achieve in the meeting. What would success look like? The meeting may not take the direction you intend, but you must have an objective and a plan to get there.

**DON'T ASSUME YOU KNOW THE ANSWER:** Yes, they called you. Yes, you're an expert in the issue. Yes, you've done this work a hundred times. Yes, you have the answer. Your potential client knows you have the solution, that's why they called you. But what they don't know is how well your process fits in with their company, its culture and its people. Attorneys often falter in their first meeting because they go in expecting to convince the client that they have the right solution. When in fact, clients want to experience how you'll get to that solution working with them. The way to demonstrate this is to skillfully ask questions that get to the root issues they face, the parameters of how you need to work with them, the aspects of the issue that are most important to them and the unintended consequences they sorry could develop. Demonstrate your experience by asking the right questions and really listening.

**ADOPT THE 'INDEPENDENTLY WEALTHY' ATTITUDE:** If you were independently wealthy and agreed to meet with this client, it would only be because you were genuinely interested in helping them and knew that you could help them in a way no one else could. This is a crucial attitude to adopt as it takes the pressure off having to make the sale and it focuses the discussion on the client.

**BE CONFIDENT BUT NOT COCKY:** Clients are looking for professionals who are confident in their ability to help clients but not arrogant. Confidence is demonstrated through preparation, a command of the issues and most recent developments in the matter and by asking compelling questions. Avoid creating the impression that you have a 'cookie cutter' solution. Most clients want efficiently delivered solutions but want them to work first within the unique constraints of their business.

### 2. PREPARE FOR THE MEETING:

**DO YOUR DUE DILIGENCE:** Research the company, industry and the people you are meeting: (Use the worksheet 'Understanding Your Client's Business'). Look each up on Linked In and the company's website.

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Research litigation and transactions, key executives and understand the business model and structure of the company. Also, conduct research regarding the main issues and questions the client has.

**CONFIRM THE MEETING DETAILS:** Make sure you've confirmed the location, time, who will be in attendance, directions, parking, contact in case of delays, etc. The worst thing you can do is be late so do whatever you need to ensure you will be on time.

**CHECK CONFLICTS:** Check your client conflicts database to ensure there are no conflicts to working with the prospective client.

**PREPARE AN AGENDA FOR THE MEETING:** Prepare a short agenda for the meeting and send it in advance to the individuals you are meeting with. Include the bios of the attorneys that will accompany you to the meeting. Ask for any additions or changes to the agenda. Preparing the agenda and researching the company and the legal issues can build your confidence level.

**PLAN OUT THE QUESTIONS YOU NEED TO ASK:** Once you've thought through the issue and how the meeting is likely to unfold, write up a list of questions that you need to ask to fully understand the issue, the company, how the client prefers to work with counsel and anything else that will help you determine the parameters of an engagement.

**IDENTIFY THE INSIGHTS AND EXPERIENCE YOU OFFER:** Plan the insights and perspectives you can bring to them. Collect examples of work you have done for similar clients and be able to explain how you have successfully tackled challenges they are likely to have. Prepare a list of the added value you can bring to the engagement.

**PRACTICE THE FIRST MEETING:** Practice and role playing a first meeting can help reveal questions and situations that you might not otherwise anticipate. Practice raises your comfort level and enables you to try out responses to various questions. Role playing adds another person's perspective and ideas of how the meeting will unfold. And it gives you an additional perspective on how you answer questions, greet people and other details that you won't see if only practice the meeting alone.

## 3. CONDUCTING THE MEETING:

**DRESS PROFESSIONALLY:** How you are dressed matters. It creates the first and often a lasting impression. Under dressing or overdressing for the situation can leave impressions that are hard to overcome so dress appropriately for the meeting. When in doubt, it is always better to be a bit over dressed than under dressed.

**BE AUTHENTIC:** It seems silly to advise you to be yourself but the only way to be truly comfortable is to be authentic and real. And 'comfortableness' comes across as confidence, which is an important criterion in the selection process. People hire professionals who are confident. Being yourself allows your confidence to shine through without it coming across as arrogance.

**BE ON TIME:** Nothing throws a meeting off kilter like being late to the meeting. Plan for contingencies. Confirm the details of the meeting, who you will meet with and the agenda for the meeting.

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**SELECT THE BEST SEATING:** If you are meeting in a restaurant, choose the seat against the wall with your client facing you across the table. This limits the distractions the client might experience by people walking through the restaurant or seeing someone they know. You want them focused on the conversation and you. The same is true in a conference room, try to seat the client where they will have the least amount of distraction.

**TREAT EVERYONE WITH RESPECT:** You're under a microscope at your first meeting with a prospective client. It is expected that you'll be kind and attentive to the decision maker. But how you treat those that have no say in the decision to hire you says much more about what the company will experience in working with you. Treat everyone you encounter with dignity and respect, whether it is a waiter, receptionist, mail clerk or door man. Relationships often run deep among people who work together so treat everyone as if they have an equal say in whether or not you get hired.

**DETERMINE CLIENT'S GOALS:** Ask the client about their goals for the case or matter. Probe to understand not only the matter or case results they want achieved but also their objectives for managing the matter, their communication preferences and who should be appraised of progress.

**CONFIRM KEY INFORMATION AND CLARIFY YOUR UNDERSTANDING:** Once the client has described their issue, review the key information with the client and clarify anything that you don't fully understand.

**SET AND MANAGE EXPECTATIONS:** You'll not learn everything you need to know at a first meeting, so set expectations for the additional information or research that is needed. If you need to follow up, make sure you set a definite date and time when that will happen.

**CONTRIBUTE VALUE AND INSIGHTS WHERE POSSIBLE:** Based on your research and/or experience, take opportunities to provide new and relevant information that adds value to the contact or provides a fresh perspective on relevant points of interest.

**TAKE NOTES:** Be sure to capture the important points of the discussion by taking notes. Don't take notes on your laptop. Use paper and pen instead as the retention is better, its more transparent and you'll take more efficient notes. Obviously, be careful not to transcribe the meeting. This is wasteful and distracts you from the discussion.

**SHOW GENUINE INTEREST AND ACTIVELY LISTEN:** This is the most important advice I can give. If you've prepared your questions well and built some rapport, the meeting should be a fluid discussion of the issues and challenges the company faces. Use your great questioning, listening and clarification techniques to gain a better understanding of the client's organization and particular details of the issue that they are facing. This is not the time to sell. It is best to demonstrate your command of the issue by asking good questions and then listening intently to the client's answers.

**DISCUSS OPTIONS AND POTENTIAL OUTCOMES:** Once you have a good feel for the client's situation, needs and goals, discuss the options you see with the client and the potential outcomes and risks. Qualify your comments that you'll need to review the matter in more detail but demonstrate that you have a firm grasp on the issues, case law and potential risks. Keep your discussion of the risks realistic and practical. Now's not the time to scare a potential client with remote possibilities of outcomes or risk. Explain your thinking in terms that business people can relate to and avoid excessive legalese.

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**BE CONSCIENTIOUS OF TIME:** Time is money. Your first meeting is the place to demonstrate your efficiency and effectiveness. Demonstrate this by starting the meeting on time, staying on track and ending the discussion by summarizing the key points and next steps.

**AVOID QUOTING FEES:** Avoid quoting fees or making 'range of fee' proposals, terms or other financial commitment. Allow yourself time to consider the matter and offer to follow up with a specific proposal.

## 4. MEETING FOLLOW UP:

**SEND FOLLOW UP CORRESPONDENCE:** Send a note to confirm what you discussed in the meeting and the next steps or deliverables that you both agreed to. Be sure to thank the client for their time and confirm the meeting or call dates and times if these have been agreed to.

**FOLLOW THROUGH ON COMMITMENTS:** If you agreed to provide additional information, make sure you provide that in the time frame you proposed. If the client agreed to provide additional information and you have not received it, send a gentle reminder to the prospective client.

## KEY POINTS:

**HAVE CLEAR OBJECTIVES:** The objectives of first meetings is to build chemistry and rapport and learn about the prospective client' business. Avoid selling or pitching. Ask open ended questions. Client's should do the majority of the talking.

**PREPARE THOROUGHLY:** Be prepared by researching the company, the legal issue, how you can add value and practice conducting the meeting.

**DEMONSTRATE INTEGRITY AND TRUST:** Build trust by demonstrating that you care about the client and the company's issue, by speaking honestly about the results and risks and by demonstrating your competence in and knowledge of the issue.