

## **TAB 14**

### **Getting and Keeping Clients**

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**Parnter**  
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### **Practice Workshop: Opening your Law Office**



LET RIGHT PREVAIL

The Law Society of  
Upper Canada

Barreau  
du Haut-Canada

**Continuing Legal Education**

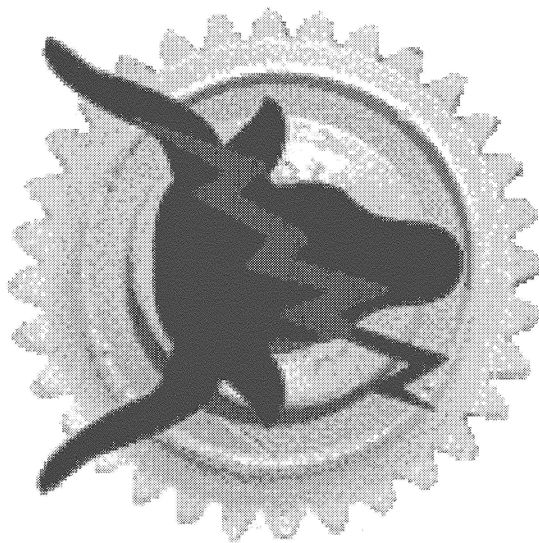


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# **Getting and Keeping Clients**

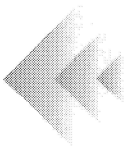
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**LSUC - Toronto  
June 10, 2004**

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# Introduction

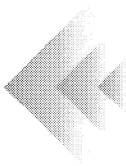
- ◆ Purpose of session
  - ☞ Raise your profile
  - ☞ Raise your firm's profile
  - ☞ Assess your effectiveness
  
- ◆ NOT about rainmaking



# Trends and Issues

## ◆ Client-driven Initiatives

- ☞ More likely to mobilize lawyers
- ☞ More likely to bring about change
- ☞ Need information about top 10 clients of firm
- ☞ Need information about your top 10 clients



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# Your Challenge

- ◆ 100 Hours of Innovation
  - ➡ Must be strategic and aligned
  - ➡ Must be balanced  
( *financial, clients, processes, people* )
  - ➡ Must be practical
- ◆ Domination in Your Market Sector



# Two Principles

- ◆ The Contrast Principle
  - ☞ Something negative said or expected followed by something positive regarding legal services
  - ☞ Time-based competition



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# Two Principles

## ◆ Creating Value

☞ Quality

- Service
- Results

☞ Price

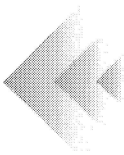


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# The Strategy

- ◆ Differentiate

- ☞ Your lawyers are unique
- ☞ Your clients are unique

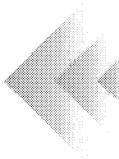


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# The Strategy

## ◆ 7-Point Service Guarantee

- ☞ 7-24 access
- ☞ 2-hour response time
- ☞ Never come in
- ☞ No paper
- ☞ Price, not rate
- ☞ 5-point evaluation
- ☞ 2 x money back if not satisfied with service and results



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# Innovation

- ◆ 100 Hours of Innovation
  - ☞ 2 hours per lawyer / paralegal each week
  - ☞ 100 hours each per year
  - ☞ Team-based approach





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# Innovation

## ◆ 100 Hours of Innovation

- ☞ Ideas and priorities by  
December 15<sup>th</sup>
- ☞ 10 hours of focused thinking  
and discussion



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# Innovation

- ◆ Four Types Essential
  - ☞ Innovation with Clients
  - ☞ Innovation with New Services
  - ☞ Innovation with Pricing
  - ☞ Innovation with Talent



# The Plan

- ◆ Two (2) serious initiatives each year
- ◆ Initiatives must be **SMART**
  - ☞ **S**pecific
  - ☞ **M**easurable
  - ☞ **A**chievable
  - ☞ **R**esults-oriented
  - ☞ **T**eam-based



# The Plan

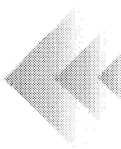
- ◆ Some initiatives will be industry or client-specific
- ◆ Some initiatives will be for Practice Group
- ◆ Some will be for yourself (*skills, knowledge*)



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# The Plan

- ◆ Write it down
- ◆ Give it to the Managing Partner
- ◆ Give nagging rights
- ◆ Revise it every 90 days



# The Plan

- ◆ Visit one prospect  
each week
- ◆ Visit one ex-client each week
- ◆ 30 minutes per visit
  - ☞ 20 minutes for the client
  - ☞ 8 minutes for the firm
  - ☞ leave 2 minutes early
- ◆ Ask to come back in six months



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# The Plan

- ◆ Bring a partner (*to listen*)
- ◆ Ask for a tour
- ◆ Client panels
- ◆ Use testimonials



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# The Plan

- ◆ Legal home page
- ◆ FAQs
- ◆ No-cost services
- ◆ Dress casually
- ◆ No discounts

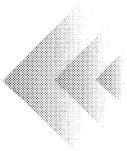




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# Conclusion

The past is not  
a predictor of  
the future

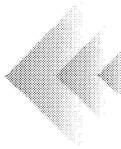


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# Conclusion

Fortune Favors  
the Brave

*( Old Golf Proverb )*



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# Conclusion

The Future's so  
bright, you're going  
to need shades