

Winning engagements

By Linda Julian

Obtain your client with your *product* ...

Retain your client with your *service* ...

Turn your client into an evangelist with your *results* ...

Effective Engagement Management

1. Explains and positions your product
2. Commences service relationship
3. Establishes expectations about results
4. Sets the tone for the relationship

Throughout the engagement there are two important psychological principles at work:

- Primacy
- Recency

Engagement processes are most important determinant of ...

PRIMACY ... sets the perceptual screen

Maybe you've rarely had a complaint with your engagement processes ... but consider

Source: Tom Peters (author of "In search of excellence")

- For every client who complains, 26 unhappy ones don't bother
- 91% of clients you lose at that point will never return
- Each dissatisfied client tells 14 others of their dissatisfaction
- It is 5.7 times harder to win a new client than to keep an established one

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Engagement best practice

Objectives at engagement:

- Establish credibility
- Develop rapport
- Understand objectives and concerns
- Agree expectations
- Determine fit: go / no go
- Manage risk
- Set scene for satisfaction

Establish credibility

- Do some background research
- Plan your opening remarks
- Rehearse
- Sell yourself - you are the product
- Sound the part
- Look the part
- Ensure your offices look appropriate
- Be on time
- Outline relevant experience solving similar problems

Develop rapport

- Show genuine interest
- Meet selected clients at their business premises
- Get the body language right
- Make eye contact
- Use client's name
- Ask questions
- Listen actively
- Beware: "I'm so busy"
- Adopt client terminology, vocabulary
- Show you want to understand

Understand objectives, concerns

- Discover needs
- Survey problems
- Find out what's important to the client

Questioning technique:

Close questions: yes/no

Open questions: reveal information, opinions

Probing questions: elaboration, reveal motivations

Agree expectations

- Results or outcomes
- Role
- Time line
- Communication
- Fees
- Billing

Results or outcomes

- Range - most favourable - best alternative - other possibilities
- Assessment of probability of success
- checkpoints

Agree role

- Completely lawyer-run ?
- More self sufficiency ?
- Options for client to co-produce service - do some / all of the work
- Checkpoints

Time line

- Most probable
- Factors impacting timing
- Checkpoint

Communication

- Client personnel to be involved
- Your personnel
- Progress reporting
- Favoured channels

Fees

- Style
- Formality
- Frequency
- Checkpoints
- Structure or basis: time-fixed-other
- Likely amount or range
- Checkpoints

Disbursements

- Likely items
- Likely quantum
- Timing
- Checkpoints

Billing

- Frequency
- Style and level of detail
- Credit terms
- Processing requirements
- Checkpoints

Determine fit: go/no go decision

- Is this the right client ?
- Is this the right matter ?
- Is it a strategic fit ?
- Can we do a better job ?
- Is it likely to yield a satisfied client ?

Manage risk

- Professional role
- Terms of engagement
- Scope of work
- Communication
- Expectation management
- Checkpoints

Set scene for client satisfaction

- Deal with client as they choose
- Use media they choose
- When they choose
- In the tone they choose
- Occupying the role they choose
- Aiming for optimal outcomes
- Conveying your genuine desire and sincere concern to be effective in the client's interests
- Treating client as an individual - not as "all clients"
- Conveying enthusiasm - better still, passion

Some useful questions

- How do you want me to communicate with you ?
- How will you evaluate our performance ?
- What result do you want ?
- What is the impact of this situation on you ?
- How does this problem affect you ?
- If you ever feel things are not going entirely as they should, will you promise to alert me to that ?
- What role do you expect me to play ?
- How involved would you like to remain in this matter ?
- What else can I do for you at this time ?
- How satisfied are you with our work on this matter ?
- What do you feel we have done especially well so far ?

- Where have we fallen short of your expectations ?
- Are we easy to deal with ?
- How could we improve ?
- Do you feel that you have received value for the fees and disbursements you have paid ?
- Are there other legal matters that we can work on together ?
- If you had a friend or colleague who needed similar advice, would you refer them to me/us ?

Effective management techniques will ...

- Position you as "best choice"
- Establish basis for quality service relationship
- Assess and manage expectations
- Promote appropriate lawyer/client partnership

About the author

Linda Julian is acknowledged as a leading authority on strategic practice development and how to win business for law firms. Since 1979, she has consulted with lawyers and other professionals throughout Australia, New Zealand, the Pacific, and Asia on a wide range of business acquisition, client retention, and strategic management issues.

Her book *The Passionate Professional: creating value, success, and prosperity* has sold in 13 countries and has received wide acclaim. Linda lectures in strategic management and marketing professional services at post-graduate level. She leads the small and highly specialised Julian Midwinter & Associates consulting practice.