

**Closing the Sale/Client Meetings**  
**by Matt Sanderson**

I am frequently amazed at how often prospective client meetings convert prospects into clients. This occurs so much, that I, in fact, no longer concentrate my marketing efforts on many of the details of client meetings, and I instead focus on meeting prospective clients. However, for many, this is not the case. Accordingly, the following article shows just how easy this process is, and hopefully it will serve you as well as it has served me.

**I. Overall**

Before addressing the specifics, though, this concept is easily summarized with just one suggestion: Ask questions of your prospects. Marketing materials describe at length that there is no greater sound to any person than the sound of their own voice. Additionally, too many people want to tell or sell, when they meet with prospective clients. Attorneys are some of the worst at this trait. Clients instead want you to ask them questions about their business and demonstrate to them through your questions that you know something about their field or industry.

**II. The Client Meeting - Basics**

With this in mind, the specifics of a typical client meeting should easily flow. First, plan the meeting in a place or situation that puts your client at ease. I enjoy meal meetings out of the office, but if you must meet the client at your office (of if they expect it), make sure they are comfortable. Ensure they have something to drink and that any other reasonable physical needs are met so that they can completely focus on your meeting without distraction.

Next, address their immediate interest. If this client is a “down to business” or “cut and dried” type of individual, dive right into the legal issue or reason for the meeting. However, most people do not fall into this category. Instead, again for most people, inquire as to their well being, their take on the day’s activities, etc. Exchange, even the typical “Did you get here ok?”, or some other piece of key interest. For instance, if it is the day after the Super Bowl, and they have any interest in sports, address this first. This step may sound unimportant or a waste of time, but I find that it is key to establishing that you are not there just to charge them your hourly rate. Treating people with this human element sets the right tone that you are more than their attorney – you are a person concerned over their well being and on your way to being their trusted advisor in the future.

After establishing that you are capable of being both an attorney and their friend, direct the conversation, not to your capabilities, but instead to their reason behind establishing the meeting. Being a real estate, transactional attorney, I meet with a variety of clients about a new company they are starting or a new real estate development. Instead of starting the meeting where I feel I need to sell them on my skills or validate my

purpose to them as a lawyer, I make it easier on them and on myself by taking an interest in their overall project. Many marketing professionals refer to this approach as peeling back an onion. We peeled the first layer by talking to them person to person, rather than lawyer to client. It is now time to peel back the next layer, which is to take an overall, broad interest in their business, again rather than the specific reason for their visit.

Taking the example mentioned above about a client who wants to meet about a new real estate development, I often ask the following questions: “Tell me about your development.” “What type of development is this, again?” “Where is it?” “How large is it?” “Are there any other investors?” The questions, even at this broad level, are endless.

However, until they are ready to tell me what they want, and most importantly that they want to hire me, I ceaselessly ask question after additional question until they are ready. I take one topic about their case at a time until there is no aspect of that topic that I do not fully understand. If they have not instigated hiring me thereafter, I move to another topic, and I continue to delve deeper and deeper and more specifically, until they tell me they are ready to for me to be their lawyer.

Thus, going back to the real estate development example, I inquire as to the type of project it is, and I find out all there is to know about it. I then move to the structure of the entity doing the work for the project. I then move to the financing for the project. In each category, I peel the onion further and further back until they decide they are comfortable with me as their lawyer and that they know that I will be there to monitor as much or as little of the project as they need.

The beauty of this system is that in asking all of these questions and establishing their trust in me, with each question I identify more and more categories with which they might need my help. I have identified for instance that they have a development project and I can help them buy the land. However, by asking these additional questions, I can identify if they also need me to create an entity as well. Then, I can determine if they need me to negotiate with their partners the terms of the entity’s corporate documents. I can also figure out if they need help reviewing their financing for the project. However, rather than simply asking if they need me to do these things, which will be perceived as addressing my need, I have been asking what the status of the project currently is first, which is perceived as my inquiry to their needs.

As I mentioned above, by truly looking into the client’s needs and showing a true and sincere interest in what they are doing from their business perspective, I am constantly amazed that I rarely, if ever, have to ask if this is something they need my help in performing. I never have to say, “Is this something you’re interested in?” or “What part can I serve?” Instead, having shown an interest, at the end of the conversation, they normally outline for me exactly what they want me to do because I guided them with my questions as to the areas that they need to consider.

For instance, in going through this list of questions, I might ask, “In your partnership, what is your agreement with your partners if someone needs to leave the

partnership?” In no way am I selling legal services. Instead, I have shown my concern for a very likely possibility that may come up through a long real estate development. Most of my clients tell me they never have considered this, and they ask me what I recommend. Some lawyers at this point might get nervous that the client is going to take their advice without the resulting remuneration to the attorney, but I give that no thought. Instead, I provide my recommendation, and they normally then ask, “Is that something you can help me with?”

### **III. Closing the Deal**

Having laid all of this ground work, the final step is to close the deal, which simply means to end the meeting in a way that allows them the opportunity to hire you as their lawyer. As noted above, if you ask the right questions, most of the time this step takes care of itself. By asking the questions above, the client will generally ask, “Can you help me with this?” or “So how much do you estimate this to cost?” These, and many others, are typical buying questions that clearly signal you have the sale. All that is then needed is to present the right opportunities to allow them to feel comfortable signing an engagement letter and providing you with a retainer.

So at the end of the meeting, whether they have asked a buying question or you are sure that the time has definitely come to end the meeting, I rarely deviate from the following. First, I sum up, in broad strokes, the terms of their project. For example, I would say, “So tell me if I understand the project. It’s a shopping center development with 15,000 square feet. You have a letter of intent on the land, but we need to form a new entity. Your partner is contributing \$50,000, and you are the sweat equity. The rest will be financed via State Bank, and you are 50% leased up already.”

Second, assuming that is correct, I outline all of the tasks that need to be complete. The example here is, “Okay, Jim. With that in mind, then, we will need to execute a purchase agreement with the Seller, perform our due diligence, form the entity and negotiate its terms with your partner, negotiate the financing documents, and prepare form leases for the tenants.” By doing this, I have provided a specific task for each step of their project.

Third, and this would also be in response to a buying or cost question as well, I almost always say, “Our involvement and your cost is absolutely up to you. We would be happy to be as much or as little involved as you would like. We can do each of these tasks [as you have outlined with them], and here is a cost estimate for each task.” I then break down the tasks and the associated costs for each, and I present them with an estimate of the whole project as well. Of course, I heavily emphasize that these are estimates only, and that any non-standard factor will increase their costs. I then explain that engagement letters and retainers are our firm’s practice, and I seek such items from them appropriately.

The strategy behind closing the deal in this way, again so long as you have asked the right questions all along, puts the client in the driver seat. They can spend as much or

as little as they want because you have broken down all of the parts to the deal. Further, you are again asking them a question in a way that is designed to seek their needs, which are (A) what they want and (B) how much they can afford. If performed in the right way, this strategy should result in some revenue generation for most meetings.

#### **IV. Caveats**

Notwithstanding the above, there are some key things to remember in using this strategy. First, it requires sincerity. If you do not care about the client's business and are there to hustle them, it will come through, and there is nothing you can say otherwise.

Dovetailing with sincerity, you must actively listen to the client. We all know that there is listening and there is really listening. Pay attention both to what they are saying and to how they say it. Good listeners know not just the facts but also what really concerns their client. For example, I keep asking questions and recording answers with relative speed until I hear something that I think concerns the client. I then put on the brakes and slow down and look them in the eye. I will then ask why it concerns them and draw out any issues related to their concern. Again, I am not selling. Instead, I am helping them satisfy their concern, and if performed correctly, the client should leave the meeting feeling that they have protection and help related to their concern.

You should also know something about their field and/or their business. That is not to say that you have to be an expert; we all start somewhere. However, knowing the basics behind a real estate transaction, or starting a company, or filing a lawsuit in the client's area is vital to directing your questions.

#### **V. Helpful Hints; Advanced**

In addition to the above recommendations, physical communication is as important as verbal communication. When you meet with your prospective client, smile and speak in a friendly manner. Make eye contact with them. Dressing appropriately sounds easy, but it is actually rather difficult. When in doubt, of course, dress professionally. However, in some industries a suit and tie may actually work against putting the client at ease. I happen to represent several junk yards, and except in court, my clients in that industry would feel uncomfortable if I showed up wearing a suit and tie. Nonetheless, if you are meeting with a banker, a formal suit is absolutely required.

Use your prospective client's name. Except when the client is speaking, the next best sound they can hear is the use of their name. Of course, this can be overdone, and you should refrain from using it in each and every sentence. However, if you conservatively throw in the client's name into your conversation, especially on an important point or one they want to hear, it can make a difference to them.

Taking time does not have to be time intensive. As lawyers, most of us are paid relatively directly related to the number of hours we bill. Thus, to us, time is literally

money. Accordingly, please do not misunderstand the amount of time these client meetings should take. Clients typically do not want to meet for more than one to one-and-a-half hours, and meetings any longer than this will bore you both. In that time, if you know the topic well, you should be able to put the client at ease, question them about their project enough to show your interest and expertise, establish yourself as their advisor, and present them with their options and your availability.

Assume that your client wants you to be their lawyer. Much of the above simply relates to this concept. When your client wants to meet with you, you should know that they want to hire you as their lawyer. There should be no question in your mind prior to the meeting that, when they leave, they will be your client.

Avoid the use of the word “You.” This puts people off, and it is best saved for a cross examination. Instead, use the word “we.” As attorneys, we tend to do this anyway with opposing counsel. When drafting a settlement agreement, we do not normally say, “Our client has to pay you \$50,000 for a release.” Instead, we normally say, “We pay you \$50,000, and you give us a release.” The same, then, should be true with your client. You are on the same team with them, so using the word “we” shows that you are. Do this from the very beginning of the client meeting, and by the end of the meeting, they will consider you part of the team, too.

## **VI. Conclusion**

In conclusion, implementation of the above strategy should result in a higher percentage of successful client meetings. The key, again, is to be sincerely interested in the client’s needs. If performed correctly, you should say very little in these meetings that is not in the form of a question, and the client should come away from the meeting feeling secure in their choice of a lawyer that is knowledgeable and skilled in the area they need.