# Client Development in a Nutshell

## What You Need to Learn and Practice for Long Term Success

**Cordell M. Parvin**

4551 Crossvine Dr.
Prosper, TX 75078
214.305.5322
cparvin@cordellparvin.com

CORDELL PARVIN LLC

# ABOUT CORDELL PARVIN

Cordell Parvin practiced law for more than 36 years, beginning with a small firm in Roanoke, Virginia and ending with a large firm in Dallas, Texas. He was a Practice Group Leader and developed a highly successful national construction law practice. During his career, Cordell taught, mentored and coached young lawyers on their careers, professionalism, client development, and work-life balance.

At Jenkens & Gilchrist, PC, Cordell initiated and directed the firm's Attorney Development Program. He created a comprehensive program for associate development focused on skill development, mentoring, shadowing and career planning. Cordell also coached senior associates and junior partners on client development.

In 2005, Cordell left Jenkens & Gilchrist, PC and began teaching and coaching lawyers throughout North America.

On my Blog, http://www.cordellblog.com/, I write about client development five times a week. There is a place on my Blog where you can subscribe to my blog or choose to receive the blog through RSS feeds. .

I am also on LinkedIn, Twitter, and I have a coaching group page on Facebook. I use the coaching page on Facebook to post materials I think you will find helpful. This way there is less in your email in-box. Here are links to my social media pages.
http://www.linkedin.com/in/cordellparvin
http://www.facebook.com/cplawyercoaching
http://twitter.com/cordellparvin

## What is Happening?

Client development is more challenging today than ever before. Clients, the economy and technology have changed. Your clients have more choices and less time to choose. You likely have less non-billable time to devote to client development.

## What Do You Need to Know?

A) Client Development Myths:

Many associates buy into client development myths that stifle their efforts. Below are the most common myths I see and my response:

1. You either have it (skills to develop business) or you don't. I can tell you from personal experience that I did not naturally have it. Knowing that drove me to work at it and develop my skills. So, you can learn to successfully attract clients if you are open to ideas and willing to work at it.

2. Just do good work, get a Martindale A-V rating and wait for the phone to ring. I was told that when I was an associate. The problem is there are thousands of lawyers in your city or state who do good work. Client development is a contact sport. It is about building relationships and adding value beyond the good work.

3. You have to do client development "my way." Senior partners sometimes make that point and an associate may not see himself or herself to be like that partner. I know from coaching over 1000 lawyers that each person has their own unique skill set and strengths. I encourage them to figure out what will work best for them and then do it that way.

4. I'm "too young, and inexperienced to…" You are never too young to start learning client development skills. You may not bring in business right away, but that is ok. This is a marathon not a sprint, you are building towards doing so later. If you wait until you are a partner to start making the efforts, you may have the same learning curve.

5. You have to be an extravert and know how to work a room. I know lawyers who are very outgoing and do poorly because they talk about themselves and do not listen. I know introverted lawyers who ask great questions and listen who do very well.

6. You have to "ask" for business. Some lawyers are good at asking for business. Others who ask come across as needy or greedy. I, personally,

was uncomfortable asking so I tried to be the "go to" lawyer who would be sought by clients in my target market.

7. Associates in big firms do not need to learn client development. At the very least, associates in big firms with institutional clients need to learn about those clients and find ways to become more valuable to those clients. In the current economy institutional clients are no longer loyal and they are looking more for value in their outside legal expenditure. As a result, learning the skills to get new clients is more important today than before.

## B) Challenges: Energy and Time

I am convinced that our two most important resources as lawyers are our time and our energy. How well are you using your time and what are you doing to have a high level of energy?

Carl Sandburg, a noted author, once said: "Time is the coin of your life. It is the only coin you have, and only you can determine how well it will be spent. Be careful lest you let other people spend it for you."

I want you to use your imagination with me. I bet you waste at least 30 minutes a day on things that really do not matter. I know I open and sometimes respond to unimportant emails at least 30 minutes during the day. I also do things I could delegate to others. Finding materials on my desk or in my office causes me to lose time. Suppose you saved 30 minutes a day and used that time for client development or your own development, what do you think would happen to your career?

I learned about the importance of energy management by reading <u>The Power of Full Engagement: Managing Energy, Not Time, Is the Key to High Performance and Personal Renewal</u> by Jim Loehr and Tony Schwartz. I urge you to read the book or listen to the CDs. The authors point out the importance of the energy we bring to any task. Interestingly, we have two problems. First we do not have enough energy to meet the demands we are placing on our energy, and second, we do not renew our energy very well. What can we do to change? First, we need to focus on the four aspects our life: physical, emotional, mental and spiritual. Next, we need to change our thinking from the idea that we are running a marathon to the idea that we are running a series of sprints. Balancing stress and recovery is critical to managing our energy.

## C) Focus on Long-Term

Successful lawyers have a very clear idea of what they want to accomplish. They know where they want to be five years from now, maybe even 20 years from now. Having clarity on what you want to accomplish with your career actually enables you to have more time for your family. How do you suppose that happens? Put simply, lawyers with clarity on what they want to do with their career do not waste lots of time. Lawyers without clarity do waste time and frequently are spinning their wheels and frustrated by it. Clarity about what you want also gives you energy. One way to gain clarity on what you want is to write down what you are doing and what your life is like in five years from now.

In April 2020 (five years from now) where do you want to be?

Where are you living? ____________________________________________

If you have children, how old are they? ________________________________

_______________________________________________________________

What kind of legal work are you doing? ________________________________

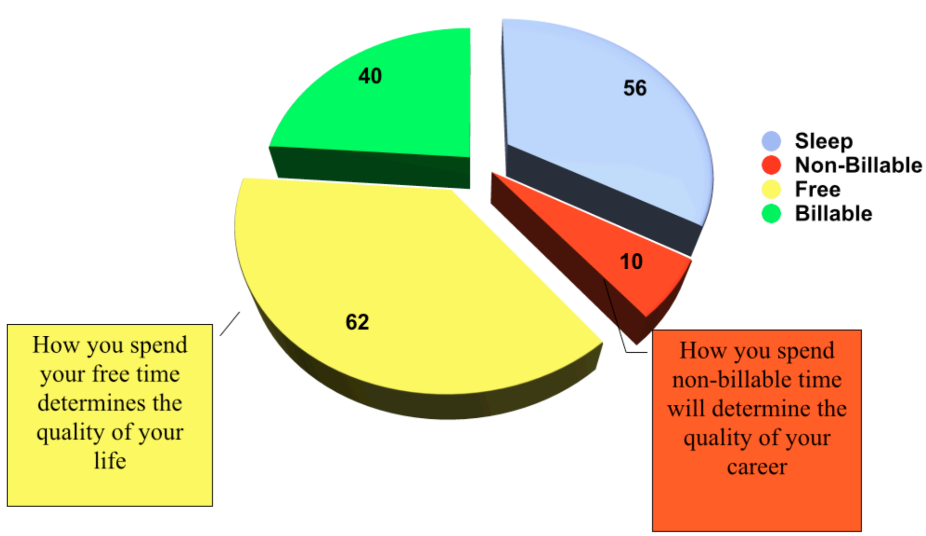
_______________________________________________________________

What kind of clients are you serving? _________________________________

_______________________________________________________________

How much business are you generating? ______________________________

## D) How to Spend Your Time Weekly



## E) Sources of Potential Clients

Have you ever thought about your potential clients and asked yourself: Where do my potential clients hang out? What industry associations do they participate in? What do they read? Are they on social media sites? Then purposely become active in your clients' industry association, your community or whatever suits your strengths. For me, speaking and writing for highway construction industry associations was my most important activity.

Another important thing to keep in your mind is what is called the 250 rule. Joe Girard, record-setting auto salesman, created the rule. The essence of the rule is that if someone was getting married or getting buried on average, he or she might have about 250 people show up. For your purposes, every contact you have, likely has 250 contacts. Think about which of your contacts has more who are potential clients and referral sources. You want to spend more of your time with those contacts and find ways to get to meet their contacts who are most relevant to your practice.

## F) How to Prepare a Plan

If you answered the questions in C) Focus on Long-Term above you already have a head start on developing your plan:

1. Define success for you at the end of 2020 (5 years from now). It could be a number $1 million in business. It could be recognized as go to lawyer in_______ field in _____ (for me Transportation Construction Law in the US.) It could be a variety of other things. The important thing is it must be something that will motivate you.

2. Next, ask yourself why achieving that goal is important to you. It might be family security. (For me, I wanted to be recognized as being the best at something.)

3. Next, write down 10 (it could be 8, it could be 15) stream of conscious things you want to do in 2015 to work toward achieving your 5 year goal. (For my 5 year plan writing articles and speaking at contractor meetings topped my list.)

4. Then review your list and combine those that are really the same. Then, rank the items on your list 1- (if you could only do one, it would be … if you could only do 2 you would add…).

5. Once you have ranked the items, ask for each one why you think it will lead you toward your 2020 goal. Write down the reasons.

## G) How Clients Select

Client development involves building your reputation and building relationships. I believe clients still generally hire lawyers rather than hiring law firms. I also believe that in most instances your reputation gets you considered, while your ability to connect with the client representative and build their trust and confidence gets you hired. If I knew I would need double by-pass surgery, I would want to go to Mayo clinic, or some place known to have the very best heart surgeons. On the other hand, when I looked for my family physician, I asked friends about their doctors and then I met with several to determine which I felt most comfortable treating me.

## H) Clients Care About Achieving Their Goals

Are you focusing on what your clients want from their lawyer? Clearly your clients want the results they expect you to get, but that is the minimum of what they expect from you.

Clients want their lawyer to:

1. Help them save money on their outside legal cost;

2. Anticipate their issues - clients do not have time to anticipate issues that will impact them.

3. Be accountable and responsive - meaning they want you to meet or exceed any commitments you made;

4. Minimize surprises - meaning you must timely advise them of any changes when they occur;

5. Listen effectively;

6. See things they do not see;

7. Help them do their job and look good in front of their management; and

8. Provide Results - the results they expected and/or she told them to expect.

What do your clients want and how can you deliver it? When you know what they want and you consistently deliver it, you take your relationship to a trusted advisor level.

## What Do You Need to Do?

1. Focus first on developing legal skills.
2. Do the best work possible.
3. Treat supervising attorney like client.
4. Use all the tools available to you.
5. Focus on client service.
6. Regularly update your bio.
7. Dress for success.
8. Create a Plan with Goals.

   Decide how many hours to invest in your client development efforts?

   ______ Administrative

   ______ Client Development

   ______ Your Own Development

**Prioritization Matrix**

| | |
|---|---|
| High Return / Low Investment<br>Do first and do often | High Return / High Investment<br>Break down into smaller pieces |
| Low Return / Low Investment<br>Do when you have time | Low Return / High Investment<br>Say NO graciously! |

Decide how many hours to invest in your client development efforts?

90 Day Goals (Action Items)

| GOAL / ACTION ITEM |
| --- |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |

9. Active in Bar and Community Activities.

10. Share your knowledge through writing and speaking.

11. List and Focus on Your Contacts.

12. Team up with a colleague and hold each other accountable.

13. PRACTICE, PRACTICE, PRACTICE.

# Personal Performance & Development Plan

## for

## *Name:* ______

**2015**

The best learning opportunities are in your work assignments. They can create a wide variety of experiences, provide exposure to senior attorneys and partners, while helping you acquire new skills and knowledge. Associate attention should focus on finding and pursuing this type of work assignment opportunity.

**I. Personal Production**

A. Billable Hours: Monthly ( ) Annually ( )

***2015 Performance Plan @ Actual Rates (based upon hrs.)***

Rate x hrs. = $ Total Revenue

B. Which client teams interest you for this year?

C. What type of work assignments would give you the most rewarding learning experiences for this year?

D. What senior attorneys or partners would you like to work for this year?

E. Development, Practice Area and Work Mix: I expect to perform % of my hours and receive % of my revenue from related practice. Of this amount, approximately % will be on ; % on ; and % on

## II. Investment Activities

Career Development/Client Development Firm Development Investment Hours

| ACTIVITY | Target Audience/Group | TOPIC/SUBJECT | Monthly | Total Annual Time |
|---|---|---|---|---|
| **Professional Development** | Self | | | |
| **Client Development** | | | | |
| Speeches & Presentations | | | | |
| Industry/Business Conferences | | | | |
| Author Publications | | | | |
| Developing & Maintaining Contact List (calling, emailing, lunches, etc.) | | | | |
| **Firm Building** | | | | |
| Firm Committee or Leadership Position | --Select one-- | | | |
| Mentoring | Name(s): | | | |
| Recruiting | | | | |
| Training Instructor | | | | |
| **Outside Activities** | | | | |
| Community Service | | | | |
| Bar Activities | | | | |
| Pro Bono | | | | |
| Other | | | | |
| Other | | | | |

**What do you feel has been your most significant accomplishment to this point?**

**What are your professional goals for 2015?**

**Why is achieving those goals important to you?**

**What, if any, resources do you need to achieve your professional goals for 2015?**

**What skills do you want to learn?**

- **Professional Development**

- **Speeches and Presentations**

- **Industry/Business Conferences**

- **Author Publications**

- **Developing and Maintaining Contact List**

- **Firm Committee or Leadership Position**

- **Mentoring**

- **Recruiting**

- **Training Instructor**

- **Community Service**

- **Bar Activities**

- **Pro Bono**

- **Other**