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## Institutionalizing Relationships With Clients

*By Steven A. Meyerowitz*

Clients do not retain law firms, the saying goes, they retain individual lawyers. By the same token, lawyers are hired by individuals -- not by corporations, limited liability companies, partnerships, trusts or other business entities.

It is particularly important for lawyers to keep this in mind because more and more of the people who have hired them in the past no longer have their same jobs. One can credit, or blame, the new trend toward downsizing and mergers, as well as the old constants: taking a position at another company, starting a new business, retirement, and death.

A lawyer who has not institutionalized his or her relationship with a business client before the lawyer's contact leaves can be at risk. The problem is quite straightforward: The contact's replacement may hire a new lawyer. Lawyers, however, can take at least three steps to try to prevent that from occurring.

From the beginning of a lawyer/client relationship, lawyers should broaden contacts within client organizations, strengthen client links and give continuity to client relationships.

### **Broaden Contacts**

The first step for lawyers is to develop a strategy, explicit or implicit, aimed at

broadening contacts with key people -- decision makers, policymakers and check writers -- in key departments in a client's organization. Typically, this would include in-house lawyers, general counsel, department heads and other middle-level and senior executives, corporate officers and directors.

Once a lawyer decides with whom he or she wants to be in contact, the next step is to determine what channels of communication are available. If appropriate channels to more than just the lawyer's contact at a particular client do not already exist, the lawyer needs to establish them.

There are a number of ways to open channels of communication with a client. Lawyers can go to a client's special events such as annual meetings or receptions, get themselves invited to, and attend, clients' holiday parties and contribute to their clients' favored charities.

Lawyers also can create communication channels themselves, by including, for example, a number of people from a particular client on the firm's mailing list for its client newsletter. Or a lawyer can send a client's chief operating officer or director of administration a newsletter, bulletin or memorandum on specific subjects, such as recent legal developments of interest to those people. And a lawyer

who publishes an article on a topic of interest to the client's chief executive officer should send the CEO a reprint. Naturally, it is important that a lawyer not appear to go around or over the initial contact or make the contact feel less significant while trying to broaden the client relationship.

Finally, lawyers must define the message they want to send to the client. To do that, it may be helpful to answer the following questions: What does the lawyer have to say to these people? What can the lawyer's firm do for them? What product or service could the lawyer develop for, or offer to, them? What information can the lawyer provide that will be of value to the people the lawyer wishes to reach?

### **Strengthen Links**

Lawyers can strengthen the links they have with clients by going beyond superficial communications. Sending out one article reprint or one issue of a newsletter during a calendar year is simply not enough.

Instead, lawyers should find subtle, noncommercial ways to communicate their own expertise -- as well as their firm's abilities -- and to inform or remind various people at the client organization (including those who are not yet in a purchasing

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