

# **More Clients, Better Clients** **for Solicitors, Accountants & Other Professionals**

2<sup>nd</sup> Edition

*The Senior Manager's Guide To Growth  
By Revitalising The Client-Attracting Pathway*

by

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## **Table of Contents**

<b>The Challenge - Why Marketing Is So Important For Professional Firms.....</b>	<b>3</b>
<b>The Problem - Normal Website Marketing Won't Work For Professionals.....</b>	<b>4</b>
<b>The Solution - Design Your Own Ideal Client-Attracting Pathway.....</b>	<b>5</b>
1. <b>Advertising</b> - make the most of your multi-tasking website.....	8
2. <b>First Response</b> - provide a fast & friendly greeting.....	9
3. <b>Early Explanations</b> - confirm clients' perceptions match services.....	10
4. <b>Services Listing</b> - make specific enquiries as easy as possible.....	11
5. <b>Offer to Meet</b> - invitation to private face-to-face discussion.....	12
6. <b>Suitable Space</b> - surroundings to confirm your caring and value.....	13
7. <b>Deciding Assistance</b> - give the best answers to natural questions.....	14
8. <b>Engagement Process</b> - systematise your 'contracting' process.....	15
9. <b>Welcoming Process</b> - continue to build teamwork and loyalty.....	16
10. <b>Reassurance on Security</b> – confidentiality, privacy, GDPR, etc.....	17
11. <b>Liaison meetings, phone-calls &amp; emails</b> – for a good experience.....	18
12. <b>Fee Notes</b> – prevent problems and promote positivity.....	19
<b>The Implementation – How The Managing Partner Can Act On This Priority.....</b>	<b>20</b>

## **The Challenge - Why Marketing Is So Important For Professional Firms**

- ✓ **Regulatory pressures, BREXIT, cybersecurity threats, price challenges, technology takeover, natural attrition, late payments and now COVID-19...**
- ✓ **Professional firms need to attract clients more than ever.**
- ✓ **Clients have become more cautious so heating up competition**
- ✓ **Some professions know many clients remain unsupported.**
- ✓ **And standing out from a tight-knit group is always difficult!**

## The Problem - Normal Website Marketing Won't Work For Professionals

- ✓ **The 5 traditional marketing steps don't easily fit professionals:**
  - *“Getting Attention doesn't come naturally to us”*
  - *“Showing Advantages for invisible services is hard”*
  - *“Providing Proof of our Promise to help is awkward”*
  - *“Convincing People they will Gain is difficult”*
  - *“Asking for Action doesn't suit professionals”*
- ✓ **Ironically, progress may be eroding trust in professions.**
- ✓ **A new approach to marketing for professionals is needed.**

## The Solution - Design Your Own Ideal Client-Attracting Pathway

- ✓ A client's journey is comprised of many steps.
- ✓ What clients really want at every step is critical.
- ✓ 'Client-friendly' is different to 'user-friendly'.
- ✓ Trust-building methods are increasingly important.
- ✓ Missing or wobbly steps can stop the journey.
- ✓ Your whole sequence of steps needs to work well.

## How To Revitalise Your Client-Attracting Pathway

- ✓ Write a clear strategy to be 313% more likely succeed.\*
- ✓ Plan a coherent pathway rather than piece-meal bits.
- ✓ Design each step to boost the next one.
- ✓ Prepare website & leaflet readers for the next steps.
- ✓ Use psychology secrets to nudge people in your direction.
- ✓ Envision the pathway from **First-Enquiry** to **Loyal-Client**.
- ✓ Use the following steps as a checklist to stay methodical.

\* <https://coschedule.com/marketing-statistics/>

## **Strategy – Define Your Desirable Outcomes With Clients**

**Aside from other parts of the business (eg staffing, training, facilities, etc), commonly desired growth outcomes include:**

1. More suitable enquiries
2. More instructions
3. More productive teamwork
4. More reputational confirmations
5. More referrals & recommendations
6. More renewals & returning clients
7. More useful feedback

**Setting numerical goals for these will help you measure progress.**

**Try totals, ratios, percentages, etc.**

**Of course, your firm might want these in different proportions compared to colleague-competitors.**

**The question is how to achieve them? And where to find opportunities to actively work on them?(while also pursuing the professional task).**

## **1. Advertising – make the most of your multi-tasking website**

**Advertising should attract, filter and guide the best clients to contact you.**

- If potential clients are unaware of your firm, they cannot become clients.
- Your website is often the first step on your **Client-Attracting Pathway** and provides more information (updated faster) than other media.
- It's productivity is the rate of suitable enquiries you get either by email, phone or walk-in - who confirm they liked your website.
  - **First generation websites** - impersonal digital announcements .
  - **Second generation websites** deliberately send a welcoming invitation.

**Client-friendly websites can do so much to prepare visitors for the following steps to ease hesitations, speed decision-making and encourage cooperative attitudes. It can be 'tuned' to attract better clients for you.**

**Two 'good manners' words prove your friendliness more than bold claims.**



## **2. First Response - provide a fast & friendly greeting**

**Your first discussion with new enquiries (by phone, email or visit) should provide guidance as to their next step, and outline subsequent steps.**

- People put their toe in the water in this initial conversation. They are at their most hesitant and can quickly be put off. For instance, 10% of adults considered paying for legal advice, *before changing their minds*.\*
- This response should be as welcoming as your advertising has promised.
- It should aim to confirm the relevance of their query, reassure and invite people to explore their opportunities in the next step.
- Returning clients can be fast-tracked for everyone's convenience.

**Telephonists and receptionists can also include one unusual sentence that research shows will boost the likelihood of gaining an instruction.**

**\* Solicitors Regulation Authority**

### **3. Early Explanations - confirm clients' perceptions match services**

**It's important to continue to confirm the match between what people want and the services you provide.**

- Many first-timers will be unsure of whether they are enquiring about the appropriate service. Providing relevant information can encourage your **Ideal Clients** to continue and spark truly helpful collaboration.
- This is a time when better-fit clients can be identified and actively encouraged
- Training and coaching to encourage all staff to be polite, cooperative and helpful may be useful. While we might hope staff could be relied upon, we must remember that incoming calls and emails are often interruptions of other duties.

**One word can gently help those enquiring about services to feel cared for and confident that their situation will receive individual attention.**

## **4. Services Listing - make specific enquiries as easy as possible**

**Make it easy for prospects to know which specific services to ask for so they feel confident in asking for them. Remember, your services are essentially invisible to lay-people; in contrast, they can usually see the important attributes of the physical products they buy.**

- **Make it easy for people to enquire accurately about services relevant to them by writing your descriptions of services in their language so that they immediately recognise it.**
- **Redefine your product range to suit your clients' preferences rather than following industry concepts and terminology.**
- **Rewrite descriptions to catch the interest of clients you prefer.**

**There is one simple well-known word that you can use on your website and leaflets that over-ridingly encourages hesitant would-be clients to feel a bond with you that supports their wish to proceed.**

## **5. Offer to Meet - invitation to private face-to-face discussion**

**In the professional world, much business starts with a face-to-face meeting to build a trusting relationship, discuss details and encourage agreement.**

- **Few first-time potential clients** decide on complex and perhaps emotive situations outright from a leaflet or website.
- The meeting allows potential clients to 'weigh you up' by getting to know you as a person: human qualities *and* technical expertise.
- This step can be a make-or-break stage for people feeling very wary due to their lack of knowledge and uncertainties in this area.

**Encourage people to meet by telling them what the agenda is and what they'll gain from the discussions.**

## **6. Suitable Space - surroundings to confirm your caring and value**

**When meeting prospects, you want your surroundings to confirm your value message. To use a big word, everything must feel congruent.**

- In many firms, the areas where you meet clients and shape their first impressions may be visibly less loved than your individual offices.
- Many reception areas are cluttered with deliveries and miscellaneous stores.
- Many meeting rooms are poorly decorated, dimly lit, untidy and can be uncomfortable in seating, draughts, and obstacles around tables, etc.
- Many professionals arrive at meetings with only blank paper “to take the details” and have nothing physical to give back to balance the gifts.

**Help nearly-clients to relax and gain good impressions that may be vital to others involved in the decision through thoughtful space management.**

## **7. Deciding Assistance - give the best answers to natural questions**

**At the point of making a decision, you want to give the best answers to peoples' concerns. This may happen during the meeting, or afterwards:**

- During the meeting, issues like price, speed and outcome are likely to be raised. Your professional staff are best placed to respond (even though they may feel this is 'selling' which they are under-trained for).
- Telephonists and receptionists will pick up queries during the days after the meeting, to clarify points clients did not understand or had not asked questions about. When professional staff are not available, staff may try to answer as best they can – again probably without sales training.

**Both of these situations can be ameliorated by listing answers to as many of the usual questions as possible if supplied in writing in the most helpful places. Your effectiveness here can be multiplied with one word.**

## **8. Engagement Process - systematise your 'contracting' process**

**Systematising your 'contracting' process can increase its success rate, improve collaboration with clients and explain your (perhaps higher) price.**

**It can also make clients' recommendations to friends and social media reviews more productive, allowing you to further cut the cost of acquiring new clients.**

- **By enabling some instant-use assets like standard forms you save time. This reduces your time investment in initial enquiries, allowing you more time to take more care with prospects... or existing clients.**
- **Providing message templates for all relevant staff, you nudge everyone towards quality in your early communications, enhancing your client-care and reducing risks of complaints.**
- **By designing templates and statements to resonate with better-suited prospects you actively encourage them to continue down the path.**

## **9. Welcoming Process - continue to build teamwork and loyalty**

**Once the prospect has told you they want to instruct you, your immediate marketing aim is to maximise client satisfaction and cooperation, and build loyalty.**

- A few small actions – often by admin staff – can make a difference here, and at the same time allow professionals the space to focus on their tasks.
- This early part of **client-care** leads directly to later client retention success, which also helps with 'social proof' of your value to real clients.
- It can also plant useful seeds about the working relationship.

**This 'onboarding' stage is the explicit greeting of new arrivals (now that they are clients). It helps you to prevent them changing their minds, settle them into productive team-working, prepare them for major events during the work and encourage them to return to you later with their next project. As a minimum, one standard email or letter can encompass this.**



## **10. Reassurance on Security – confidentiality, privacy, GDPR, etc**

**Private individuals and commercial enterprises are bringing confidential information and may have privacy concerns beyond GDPR.**

- For many new clients, instructing a professional may feel a risky because of the understandable lack of familiarity with professionals' methods, values and expectations.
- Contentious situations may raise the feeling of vulnerability further.
- It's the professional's task to reduce these half-perceived risks as they influence client's motivation to instruct, and to collaborate afterwards.

**Many professional firms treat these issues as admin and compliance issues. They produce dry, factual policy statements rather than describe the benefits of their policy to the clients. This misses a great opportunity to establish a caring approach and confirming the welcome.**

## **11. Liaison meetings, phone-calls & emails – for a good experience**

**Continually, explicitly work to reduce upset, bring relief & invite return.**

- Any company can receive complaints from 10% to 12% of their customers. Dealing with these proactively and positively is a priority.
- It makes sense to prevent criticisms and complaints as much as possible to save time remedying problems, save money and retain your reputation. Most complaints concern poor communication. Therefore revising all standard documents and scripts is sensible.
- It also makes sense to ensure that **grumbles come to you first** rather than end up as unfair social media rants. Invite useful feedback.

**Repeat clients are the best source of work and are most likely to refer and write online reviews. Openly invite clients to renew or return.**

**Client Satisfaction is achieved through actively nurturing happy clients – and one small question helps in most steps.**

## **12. Fee Notes – prevent problems and promote positivity**

**The Legal Ombudsman says that fees are the second largest source of complaint. There are often very few clues about payment on professional firms' websites, whereas e-commerce websites all have them – because it removes clients' hesitations.**

- You can work to **minimise late payments** and bad debts by explicitly agreeing prompt payment and effective processes before work begins.
- Make query, adjustment and refund processes easy to see.
- Where possible, summarise the value received by the client from the professional work to tie the cost to the results. This may not always be easy, but it is much appreciated by clients.

**A quiet offer of discussion explaining several different payment methods and their benefits to clients can be introduced at several points along your Pathway to reassure those with particular concerns in this area.**

## **The Implementation - How The Managing Partner Can Act On This Priority**

**While advertising is most often out-sourced, all the above steps can also benefit from an external expert perspective.**

- *'Familiarity breeds contempt' – we tend to overlook everyday issues.*
- *Specialist providers are more tuned-in to spotting opportunities.*
- *'One size fits all' is rare – individually tailored solutions tend to fit better.*
- *While planning should review & revise the whole sequence coherently, updating can be programmed in batches to ease stresses in adoption.*
- *Where possible change should be results-driven, so prepare to measure before and after. Early drop-outs may be difficult to measure. But enquiries, instructions, queries, complaints, repeat business, referrals and reviews could all be usefully tracked.*

## **Prepared by Dave Simon BSc MSc MPhil**

**who also provides:**

- **A free 21-point 'Opportunities Report'**
- **A choice of 3 Pathway revitalising projects**
- **A list of 5 professional guarantees**
- **Occasional blog thought-provokers**
- **Free advice on marketing strategy**

**Please contact Dave on 01983 614795 or [dave@more.consulting](mailto:dave@more.consulting) to get your no-cost no-risk '21 Opportunities Report' to give you a practical starting point for your review of the firm's Client-Attracting Pathway.**