

HOW TO BRING CLIENTS INTO YOUR PRACTICE

SO THEY NEVER WANT TO LEAVE

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How to bring new clients into your practice so they never want to leave

You've won a new client. Great news!

A new instruction presents you with the opportunity to develop a long-term partnership and generate future referrals.

Setting a positive tone, establishing boundaries and managing expectations at the very start is key to maintaining the relationship.

The time to do this is during practice onboarding.

Answer the questions below and use your responses to create a simple onboarding system for your new client.

You'll find ten steps to consider. Your responses form the content of your onboarding system

Turn the page to get started.

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1. Design for your ideal client

Write a brief description of your ideal client. This is the person for whom you're designing your onboarding system and the person deserving of your warm welcome.

2. Say thank you at the start

Courtesy is always remembered and appreciated. Your clients have a choice about who to instruct and it's good to acknowledge that. Write a couple of sentences that explains what the instruction means for you.

3. Explain how to contact you

Clients need to know how to contact you. Decide how you'd like to be contacted by your clients and the role your Chambers team will play in the communications.

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4. Establish a communication schedule

You'll give your clients confidence and put them at ease by establishing a regular communication schedule. Decide on a regular cadence for your communications with clients. Which channels will you use to keep them engaged?

5. Establish boundaries

Boundaries are critical for establishing frictionless working relationships. Explain when you are contactable, your standard response times to respond to emails and calls (e.g. within 24 hours) and a proposal to manage differences, should they arise.

6. Remind your client about your payment terms

Check with your clerk that terms have been agreed and re-state them here. Reminding your client about the commercial nature of your agreement is reasonable. If you're not getting paid, you don't have a practice. You have a hobby.

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7. Set a review date

When are you going to review your working practices with your client? Put a date in the diary before emotions are running high so you know in advance that there is a plan to realign expectations, if you need to.

8. Ask for your client's ideas

Clients have ideas about how they like to work with their barrister. Asking for input shows that you are in listening mode. Provide reassurance of your willingness to work collaboratively and schedule a call to discuss how to proceed.

Step 9. Add value to your client

That you will provide legal advice and advocacy skills is expected. But what else can you offer which could be of value to your client? A free lunchtime talk for their colleagues? A round-up of opinion about an emerging point of law? An invitation to join your network?

10. Connect on Social Media

After this instruction, you'll want to continue to engage with your client via your online network. Describe your online networking strategy to your client and offer to connect.

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How to assemble your onboarding system

Your responses to the questions above provide the skeleton of your practice onboarding system.

Next, think about how you would like to present this information to your client. An email is a good way to get started, but you can also consider other formats, such as video or infographic.

Remember to check your Chambers branding guidelines before proceeding with a new design.

Creating an onboarding system for your clients is one of the best ways to establish a positive relationship and sets out the service delivery principles on which to build your practice for the long term.

If you'd like to check you're on the right track, email me your draft (heidi@jurilogical.com). I'll send you some ideas to help you raise your profile, connect with clients and grow your practice.

What's next?

Junior Entrepreneur is a step-by-step system to help Junior Barristers raise their profile, connect with clients and grow their practice in the Digital Age.

Learn how to create a practice that runs like clockwork so you can focus on what you do best – providing high-quality legal advice to premium clients.

Go to Jurilogical.com to register and start today.



Heidi

Heidi Smith
Creator of Jurilogical.com
heidi@jurilogical.com

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EXAMPLE ONBOARDING EMAIL

Dear [insert first name]

Thank you for instructing me on your matter. I'm very much looking forward to working with you over the coming months.

My aim is to provide you with an outstanding service. My priority is to earn your trust and confidence by demonstrating that I am listening to your concerns and responding to your questions in a timely manner.

How you can reach me

07720 288777

My personal mobile

020 7233 4564

Chambers 08.30 – 18.30, Monday to Friday

Barrister1@TopChambers.com

My personal email

Communications

I like to have a weekly call with clients to review progress. Would 10am on Monday mornings be convenient? Or please suggest a convenient alternative. I like to use Zoom for my client calls. Are you familiar with Zoom?

Ways of working

I aim to finalise my calls with clients before 6pm. I focus on written submissions in the evening.

Sunday is our family day which I endeavour to keep free for them.

Should an emergency arise which requires my immediate attention, please call my personal mobile.

Terms

As we have agreed, we shall operate on COMBAR A terms. My Clerk, Daniel Archer, will liaise with you directly regarding fees collection on the terms we have agreed.

Review

I like to set a date in advance to validate our ways of working. I would be pleased to come to your offices or invite you to Chambers, at your convenience. May I suggest Tuesday 15 June at 3pm or alternative convenient date.

Please tell me how you like to work

In my time in practice I have learned that each of my clients is unique in the way they like to work with Counsel.

I would like to establish a collaborative working partnership and welcome your ideas of how that could work best for you.

What else can I offer?

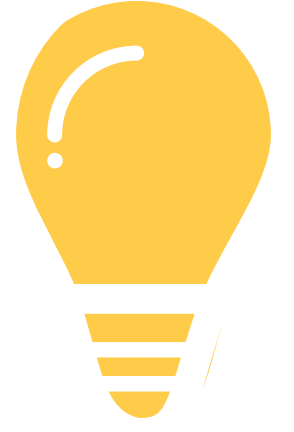
I know that your firm is interested in the complex area of Cryptocurrency regulation. Since I have a good network of contacts in this area, I wonder whether we could devise an event to share expertise and knowledge. I would be happy to assist in the organisation and propose some ideas.

Staying in touch

I run a lively community on LinkedIn. I have sent you an invitation to connect and encourage you to join in the discussion. My Twitter account is @TopBarrister

Thank you again for your confidence to instruct me. I am looking forward to our days in court!

Kind regards



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