

MENTORING FOR CLIENT DEVELOPMENT: EIGHT PRINCIPLES FOR SUCCESS

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Every successful lawyer must master skills of managing and developing clients, whether in a law firm, in-house corporate, government agency, or solo practice setting. Yet many lawyers find that they are very much alone when it comes to learning the ropes for these critical skills. While mentoring is now widely acknowledged and accepted as important for career advancement of professionals generally, it is vital for lawyers to learn how to handle clients effectively to retain existing business, obtain repeat business, and develop new business. Typically this need is manifest most critically in private practice when mid-level to senior associates must demonstrate business-getting skills for partnership consideration or when junior partners need to bring in business to develop their own practices in order to succeed as a partner. These same client relationship skills, however, affect the careers of lawyers in corporations and government seeking promotion.

A mentor for client development typically is a more senior lawyer who has demonstrated his or her own success within the same firm or other organization in bringing in, managing and/or maintaining a substantial client base. However, a mentoring relationship focused on client relationship issues, rather than the teaching of substantive legal skills, can also be with a peer; a lawyer outside the mentee's organization; a colleague in a bar association, other law group, or industry trade association; or another professional such as an accountant, banker, or broker who shares similar clients, professional interests and concerns.

The rewards of this type of mentoring do not flow only in the mentee's direction. The mentor can benefit from enhanced client relationships and referrals from introduction into the mentee's networks and relationships, from assistance in the mentor's own client development efforts through a support role as well as an interactive role, and from the chance to focus on different types of opportunities from a new perspective.

Mentors and mentees who focus on client development should generate a plan with specific goals and objectives and meet periodically to review progress, celebrate successes and identify opportunities, and to continue the development of their own relationship. Eight principles for mentoring relationships for the specific purpose of managing and developing clients are offered here.

Inventory the Mentee's Client Base

Before a mentor and a mentee can effectively discuss how the mentee can start, or increase, his or her efforts for business development, they should inventory, or assess, the mentee's current client base. From whom internally does the mentee get work—one or more partners/senior lawyers? One or more departments of the organization? Does the mentee get any work directly from existing clients? From whom among outside sources does the mentee get referrals of new

work? Is there a concentration of industries or types of clients that make up the existing client base and from which the mentee can launch more development opportunities?

Create a Profile of the Mentee's Expertise and Niche Practice Areas

Building on the inventory, the mentee and the mentor can identify trends and brainstorm ideas for improving client relationships and increasing business development opportunities from existing clients as well as from new clients. From there, they can create a profile to highlight the mentee's special skills or expertise and particular niche practice area—for instance, in addition to the broad description "intellectual property lawyer" they can generate more specific "sound bites", *e.g.*, software licensing expert, trade dress litigator, music copyright specialist, biochemical patent prosecutor. To embellish a practice area such as "commercial litigation," for example, they might describe the mentee's practice areas as, *e.g.*, lender liability defense, ADA access claims prosecution, medical device liability trial lawyer, or shareholder rights enforcement. Alternatively, the expertise may focus on the types of clients served, such as technology startups, commercial landlords, drug manufacturers, high net worth individuals, non-profit corporations, venture capitalists, or software developers. The mentor can frequently help the mentee to recognize that he or she has much more specific and marketable expertise that will be appealing to discuss with existing and prospective clients.

Capitalize on Networks

In the beginning of and throughout the mentoring relationship, mentors and mentees should identify the formal and informal networks in which they each operate, such as bar associations, professional networks, industry trade groups, social clubs and the like. They should focus on those in which the mentees feel especially comfortable and confident of building personal relationships, referral sources, and prospective clients. Attorneys should concentrate their time in participating in organizations in whose mission they believe and in which they enjoy working. Demonstrating commitment and interest to other members is a vital part of effective participation that can lead to business relationships and referrals. Where appropriate, mentors can bring their mentees to events sponsored by their networks to expand the mentees' networks (and vice versa). Capitalize on these networks by identifying leadership positions and committees in which mentees can work to increase their visibility and impact for the organization. Membership and program committees typically bring a participant into the most contact with the organization's members and other constituents.

Jointly Participate in Client Development Meetings and Other Opportunities

Mentors can bring mentees much further along by including them in activities that show client relationship and development skills in action rather than only talking about them. Such activities may include participation in, for example, client lunches, contests for new business, client seminars, or sports events (either as participants, *e.g.*, golf games) or as spectators, *e.g.*, baseball games). In the mentoring relationship, the participants should discuss on a regular basis what

opportunities there might be for the mentees to observe and/or actively participate in such meetings. They should identify in advance what role the mentees can play in these activities to maximize their effectiveness and the mentees' meaningful participation.

Pursue Speaking, Writing, and Client Seminar Opportunities

Mentors and mentees should rely on the time-proven client development techniques of public speaking and publishing in areas of their expertise. Mentees with little experience in this area may feel intimidated by taking on these extra responsibilities. Mentors should guide mentees by helping to select reasonable and manageable goals. For example, a mentee with no publishing experience could start by writing short letters to clients about a new case or regulation in their field that will have an impact on how they do business, or articles for trade publications along the same vein. Mentors can help mentees get placed on panel discussions in their practice areas to gain experience in speaking to groups. Involving mentees in the planning and participation in a client seminar on recent legal developments in areas of the firm's practice is an excellent vehicle for mentors and mentees to work together.

Coach and Debrief To Maximize Learning and Develop More Opportunities

Mentors should be available to coach their mentees as they execute their plans and work toward achieving their specific goals and objectives. They should help their mentees manage their time and set specific deadlines to do their proposed client development. In the press of client work, with court and transactional deadlines that cannot be missed, relationship-building activities all too often stay on the back burner. Mentors can help mentees stay on task for client development through coaching.

Debriefing is an equally important aspect of mentoring for client development. After mentees participate in such activities, they should discuss what happened with their mentors, consider lessons learned, and brainstorm on next steps.

Form the Mentee's "Advisory Board"

A mentee who seriously wants to advance his or her career will rely not on one mentor alone but several who offer different perspectives, style, and expertise. A mentor for client development can function not only as one member of the mentee's informal "advisory board," but also will work with the mentee to identify who else should be tapped for such a role, how to approach them, and how to maximize their relationship to mutual benefit and to gain additional client development skills.

Celebrate Successes Publicly as Well as Privately

Mentors should make a point of finding a way of recognizing and celebrating with their mentees any successful event in their mentees' client relationship efforts. Recognition of success will strengthen the relationship as well as be an encouragement to invest more resources in the effort. Nevertheless, mentors should not stop with private praise or celebration. Mentors often can publicize the successes enjoyed by their mentees more effectively than the mentees can themselves. Mentees may be shy about self-aggrandizement but mentors can praise their mentees' achievements to others in their organization and help their mentees get the recognition they deserve for their client relations success stories. Mentors and mentees together can help identify public relations and marketing activities to announce successes to the legal and client communities, capitalizing further on the successes through marketing.

In conclusion, the investment in mentoring specifically for strengthening client relationships will prove well worth the time when the participants are committed to excellence in client service, an interest in their career development, and enhanced communications with clients and within the law firm or organization. Mentors and mentees should recognize that a plan, development of rapport, specific commitment of time and resources, and follow-through are all crucial elements to the success of such a relationship but should return results beyond what they initially expect.

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