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Are You Out of Touch with Your Clients?

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Does your business rely on clients to do the work of keeping in touch?

Providers of specialized services—such as law firms and financial planners—to individuals and small businesses typically prefer to let clients find them, both to start the relationship in the first place and to renew it once the initial matter or service is concluded. For example, it has been reported that less than 20% of lawyers follow up after a client meeting. By failing to keep contact with clients, you're allowing the good will you earned in providing the initial service to dissipate. And you may not be the first name that comes to mind the next time the client—or someone they know—needs something you can provide.

You can earn repeat business—and referrals—even years after the initial service concludes.

In my business, people don't always want brand new marketing materials every year—it's potentially both confusing and expensive. Yet a substantial portion of my business comes from repeat clients, often with a gap of a few years between engagements. And I'm not the only one; many professionals I speak with have the same experience. How do they do it? Simply by keeping in touch with all clients, and focusing on maintaining the relationship, whether there's immediate business or not. Clearly it can be done—and it is valuable for both the professional and the client.

If you can, why don't you?

There are many reasons why professionals don't keep in touch with clients once the initial matter is finished or service complete. Four come up again and again in discussions with my clients and prospects:

- **Fear there's nothing to say outside a specific issue.**
  Professionals are often most comfortable talking about precise issues in a particular context. They love helping people solve problems and meet needs, but loathe dealing with unknown situations and hate the idea that they might seem pushy. This is probably an underlying reason why even highly accomplished professionals are seldom comfortable with marketing of any description.
- **Unwillingness to devote time to an activity that does not result in imminent income.**
  Many professional business models are founded on the billable hour. Any activity that cannot be billed—or at least handled by relatively cheap support staff—has a hard time competing with tasks that have potential immediate bottom-line impact. You need to allow for long term activities that could fill or even out the client pipeline and keep it flowing.
- **Erroneous assumptions**
  When you did business with a client one year and were not called back for more the next, it's very tempting to assume that this has something to do with you or your services. It probably doesn't—it is far more likely to be related to the client's priorities at a particular time, as in the case of my business where clients probably don't consistently focus on marketing strategies and materials. Another erroneous assumption is that clients only want to hear from you around business; actually, if they perceive that you're only staying in touch because you think there might be money in it for you, you won't make yourself very popular at all.

- **Lack of a system.**
  Most professional firms use systems—often well thought-out and sophisticated systems—to manage processes and functions that support the service relationships. There are systems for client intake, systems for information storage and retrieval and systems to track and bill service hours. Marketing and communications activities, on the other hand, are usually performed on an ad hoc basis, whenever the need seems really great. This is no way to assure continued contact with past—and potential future—clients.

If you can find a way to create a system that works for you, you've eliminated all these problems altogether. You'll have a pre-set menu of contact topics, and you'll already know what kind of impact your program could have on billable hours. So, how do you start?

There's virtue in simplicity.

The best systems for keeping in touch with clients who may or may not bring you future business shouldn't be elaborate. In fact, the simpler they are, the better you—and your clients—will feel about them, and the higher return you'll get on your investment. You probably don't have a lot of time to invest in something when you don't know where or when the payoff will occur. That's okay. There are a number of ways to maintain contact without making it a chore.

Follow these 7 steps to better client contact.

1. **Use touch pieces to remind clients what you can do for them.**
   Touch pieces should be gentle reminders—explicit or implicit—of why clients chose to work with you in the first place. Remember, it's not just your services—it's also the relationship. If you're an accountant who works with people concerned with following the absolute letter of the law, your touch pieces can readily focus on that. If you're an attorney known for speaking the language of artists, make sure your touch pieces maintain that level of accessibility.

2. **Make sure your touch pieces look different than your regular communications.**
   One law firm I've worked with recently sent out a letter reporting some imminent changes to everyone it had worked with over the past several years. In some cases, this was the first time clients had heard from the firm since their matters had concluded. A particular client actually reported a moment of intense discomfort because he thought the piece was one last bill. Don't put your clients through that. Have a special design for touch pieces that incorporates your regular look and feel but says clearly that it's something special.

3. **Keep your touch pieces brief.**
   A short communication is likely to cost you less in terms of effort than a longer one—and convey the message more effectively. If regular news seems like the way to go in your business consider offering a tips piece rather than a full-blown newsletter. I subscribe to about ten newsletters and am on many more email lists. Most of these things arrive in my mailbox, get scanned quickly and then are deleted; some no longer even get scanned.

4. **Communicate as often as you need to, but no more often than that.**
   People will be glad to hear from you—and to be reminded that you're out there— so long as you don't abuse the privilege. Figuring out the right frequency is somewhat tricky, but I tend to operate on the principle that less is more effective. For most firms, bi-monthly contact is the minimum to maintain—and grow—mindshare with your clients, and monthly is the maximum frequency that avoids overload and creating annoyance. One critical deciding factor is how much new material you can create.

   Some of the e-newsletters I subscribe to come out weekly, and it wasn't long before I noticed the authors repeating themselves. Ideally, people on your touch list should be able to receive your materials for two or three years without noticing repetition. By that point, either they will have forgotten or your viewpoint will have changed a bit.

5. **Get a firm grasp on the obvious.**
   A partner in a law firm I've worked with reported that her clients would come back to her for updates on the work she had already done for them. But the same clients often informed her that they had taken another matter she could have helped with to another firm. The reason was simple: she did not take the time to inform her clients of the full range of services the firm offered. She was essentially giving away business that could have been hers for the asking. A systematic touch program could have remedied that by incorporating an annual service menu message.

6. **Don't be afraid to make it personal.**
   As noted above, in a professional service firm the relationship is as important to the client as the services provided. So at least part of the reason why most clients work with you is because they like the person responsible for their working relationship—probably not enough to be best friends, but enough so that an occasional personal communication would be welcome. One financial planner I know likes to send her holiday cards out at Thanksgiving so they stand out from the crowd. Always include at least a few handwritten words.

7. **Pick up the phone.**
   Consider scheduling time every week for "just checking in" calls to well-connected or strategic former clients. A number of pieces of business have fallen into my lap because I picked up the phone on a whim to see how an old client was doing.

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