

## Building Client Relationships

by Cordell M. Parvin

I have frequently wondered why Super Bowl winners struggle the next year. In 2002, the Tampa Bay Buccaneers had a spectacular season, culminating in a 48-21 rout of the Oakland Raiders. In 2003, they did not even make the playoffs. In fact, the Bucs ended the season with a losing record. They were the second straight Super Bowl winner - 11th overall - to fail to make the playoffs the following season and the sixth that followed a Super Bowl victory with a losing record. So, what accounts for this phenomenon? Leaving aside free agency and injuries, I believe players become enamored with themselves and their success rather than focusing on their team. I am frequently reminded of the quote "Nothing fails like success." Whether it's athletes or lawyers, when we are most successful, we lose our humility and our intense hunger to become better.

I have experienced success and lost my humility only to learn I was not as on top of things as I imagined. When I have been most successful, I have been a little like those NFL super bowl players and focused on myself and not my clients' needs. Henry Ford once said: "Failure is only the opportunity to begin again more intelligently." I have had those experiences and know that in my humility, I refocus on clients and my hunger to learn how I can serve them better.

Both individual lawyers and law firms can learn from my experience. They can also learn from two fantastic books on client relationships -- *The Trusted Advisor* by David Maister, Charles Green and Robert Galford and *Clients for Life* by Jagdish Sheth and Andrew Sobel. In both books, the authors discuss the value of focusing on clients rather than on yourself.

Both books ask and attempt to answer why some highly skilled professionals have the opportunity to serve more clients than they have time to serve and other highly skilled professionals wish their phone would ring. Working hard, being a highly skilled lawyer and consistently providing high quality work is the price of admission to get into the arena, but it is not what makes the difference.

As shown below, the ability to get into your client's shoes, to understand their issues and communicate in a collaborative way are keys to becoming a trusted advisor and building clients for life relationships. Many lawyers at times are concerned more with billable hours, origination credit, compensation and bonus than knowing and understanding their client's needs and serving them. The authors give very specific suggestions on what it means to focus on clients and add value.

The *Trusted Advisor* authors state: "There is no greater source of distrust than advisors who appear to be more interested in themselves than trying to be of service to clients." As law firms have become more focused on "profits per partner" and rewarding rain makers, many lawyers have become more interested in their compensation and bonus and making sure they get credit for originations. The authors describe this as the most egregious example of self

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orientation. I have discovered that when I am thinking that way, I do not fake my interest in my client very well. They seem able to sense that I am more interested in selling than in serving. The authors include two lists of indicators. Among the many examples, they note that we finish our clients; sentences for them, we name-drop a list of our VIP other clients, and talk about our past successes and qualifications. Obviously, we also do a lousy job of listening because we are too busy wanting to show how smart we are.

Sheth and Sobel refer to this as “agenda pushers.” They are professionals who are focused on what they want and need rather than the client’s agenda. I have been guilty of being an agenda pusher. I remember doing it by cross-selling efforts and by trying to sell the next project rather than giving my total attention to the one I had been hired to handle. I know from experience that clients will want to use you less rather than more when you are pushing your agenda. They really do not care that you need the organization credit and billable hours to have a good year.

This all seems very easy to understand and logical. All of us know we need to focus on our clients and not ourselves. But, specifically how do we become more client-focused? Obviously, it means first caring more about them than we do ourselves. Sheth and Sobel describe this as “selfless independence.” They state: “Great advisors have an attitude of complete financial, intellectual, and emotional independence. They balance this independence, however, with selflessness -- they are dedicated, loyal, and focus on their client’s agenda, not their own.” Maister, Green and Galford suggest we focus on the other person, quoting Dale Carnegie who said; “The **only** way to influence someone is to find out what they want, and show them how to get it.”

The authors of both books make clear that technical expertise is insufficient and may actually be a detriment to the successful client relationship. Maister, Green and Galford suggest that technicians perform their tasks out of the client’s presence. They advise us that: “our task as advisors is an ‘in-person,’ ‘in-contact’ challenge to help the client see things anew or to make a decision. This requires a complete change of skills and mindsets.” Client development is about relationships, and that is a contact sport requiring both patience and people skills.

How can we obtain the skills and change the mindset? First, we need to have an intense interest in people. Only through having that interest will we focus on learning about clients, understanding their needs and listening with a sensitive ear. In my own case, long ago I decided to teach senior high Sunday school at our church. I decided that I wanted to get to know the teenagers, most of whom had no desire to get up Sunday morning and come to class, and then figure out ways to make the lessons meaningful from their perspective rather than my own. I really worked hard to understand what it was like to be a teenager in the early 80s. I met with them and listened. I read books and searched for different ways to reach them. I think more than anything else, I conveyed to them I cared about them. I cannot describe how valuable this experience was for me. Because the mindset of teenagers was so different than my own, understanding the mindset of my construction clients was less a challenge.

I tried other experiments to develop my interest in people. Since I traveled by myself on business, I took opportunities to talk and mostly listen with strangers I met while flying. I

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purposely engaged them in conversation and asked open-ended questions without making judgments or offering unsolicited advice. I tried to develop my empathic listening skills. This is an attribute stressed in both books.

In *Trusted Advisor* the authors quote Stephanie Wethered, an Episcopal priest who describes our ability to empathically listen as being in direct relation to how closely we can feel what the other person feels. Maister, Green and Galford list 23 things that good listeners do. Some examples include probing for clarification (“What did you mean when you said...?”); listening for unvoiced emotions (“How do you feel about...?”); taking a speaker seriously (they don’t say, “You shouldn’t worry about that.”) and summarizing a client’s story well (“What I hear you saying is...)

Sheth and Sobel interviewed corporate leaders on their most important advisors and the role of empathy: Some comments they received included:

- “The good advisor listens with the heart as well as the head.”
- “A session with a good advisor is a discussion, not a lecture.”
- “The people I am comfortable going back to time after time...they are the ones who think about my needs and how to address them, not about the project they want to sell me.”
- “The professionals I deal with must be genuinely interested in my issues and problems.”
- “The truly great advisors gain a deep understanding of my industry, of my organization, and, most important, of me as an executive and as a person—that’s when a long term relationship develops.”

Sheth and Sobel offer suggestions to improve your empathy. They suggest: “The three basic ingredients are having the right attitude (that is, an interest in people, a desire to learn, and a large dose of humility); being self aware and in control of your emotions so that you can objectively listen and observe; and developing empathetic listening skills.” They make ten specific suggestions, including these five::

1. Put yourself into unfamiliar situations where you have neither mastery nor control.
2. Accept occasional failures or setbacks and learn from them.
3. Gain an understanding of your own basic strengths, weaknesses, and personality type.
4. Always listen at the most involved level.

5. Seek honest feedback from clients about your performance and the conduct of the relationship.

I recommend both of these books to lawyers who want to build client relationships. Try the ideas the authors suggest and remain humble, but intensely determined to become a trusted advisor for clients for life.