CORONAVIRUS

PRACTICE MANAGEMENT>CLIENT RELATIONS

Reconnecting With Clients During COVID-19

Where do you want your career and practice to be when the 'new normal' arrives?

Carol Schiro Greenwald | Jun 16, 2020

It's scary out there. Every day the rules change. Some of us have no active clients, while others are swamped with clients' questions. So, what's an advisor to do? Let's acknowledge the stress caused by the magnitude of this pandemic, economic uncertainty and the impact of protests for racial equality. Then let's choose how we'll let it affect us.

On the one hand, we could play Chicken Little and dither about the collapse of the world we knew. Or, we could assume an entrepreneurial mindset and see the chaos as an opportunity to focus on what each of us can control—our self, our mindset, our practice and our relationship with our clients.

To be positive, begin by thinking ahead about where you want your career and practice to be when the "new normal" arrives. Susan Duncan in an April 2, 2020, blog post summed up this take-charge position: "As market conditions and clients' needs change, this is a time to reassess where your practice is, where it will be in six months, and how to stay visible on the radar, relevant, appreciated and in demand."

Let's begin with the most important component of your practice: your clients. Here we'll review ideas for staying connected, becoming reconnected and solidifying your marketing position as go-to estate planning lawyers and wealth advisors for your target clients.

Staying in Touch

Clients' need to reconnect physically while staying at home has made them more desperate for authentic connection. This is your chance to ramp up your advisor skills and be the trusted confidante that your clients want and need.

Most clients value proactive advice from their lawyers. Pertinent counsel puts their problems into a larger perspective, offers solutions from a different point of view and may suggest options that the client hasn't considered. Today, more than advice, clients want someone to offer a good ear: really listen, comfort, empathize. Being in the trenches together solidifies the trust foundation of your relationship.

Make outreach the focus of your basic business development program now. Begin by creating a planned approach, in which you answer these questions:

Why are you doing this?

- Whom should you call first?
  - What is the rationale behind your prioritization?
- How will you connect?
  - Will you use email first, followed by a phone call, Skype, Zoom?
  - Will you just try calling and hope to reach them at a convenient time?
  - How many clients will you call in a week?
- What will you say?
  - How will you begin the conversation?
  - What kind of help will you offer?
- What will your follow-up be?
- How will you define success?

Your Goals

It's important to return to your goals before embarking on a major business development initiative. Write down what you want to communicate about yourself and your practice. Think about how you want the client on the other end of the call to respond. How do you want her to feel afterwards?

Client Segments

You'll want to segment your clients into tranches. Possible segments include:

- Current clients: the ones you're working with right now.
- Demographic categories potentially impacted by the coronavirus:
    - "Sandwich generation" clients with vulnerable parents
    - Older clients potentially susceptible to the virus
    - Clients working in high-risk jobs
- You may also want to call potential clients who seemed ready to act before COVID-19 hit.

As you speak to them about their experiences, you'll learn how others are coping and can share the best ideas on other calls.

Setting Up Calls

It's easier to make these calls if you set them up as part of a business development program. For example, you could do two a day after lunch or around 5 p.m. or first thing in the morning. Or you could reserve an hour once a week and make four calls. Whatever you decide should be calendared into your schedule.

You may want to phone some clients and suggest Zoom or Skype calls with others. You can also consider adding in a bit of networking and suggest a three- or four-person Zoom coffee for people you're friends with or for couples you want to talk to at the same time.

Making Calls Meaningful

How will you make calls meaningful for each individual you contact? Begin by asking the client about: her situation, hopes and fears, and most pressing concerns. For example:

- "I thought of you the other day and just wanted to see how you've been during this lockdown."
- "What's worrying you now as we begin to venture out again?"
- "Did you find any unexpected benefits in working from home?"

Then listen to what she says and ask relevant follow-up questions. Ask how you can help. Some just want a shoulder to lean on; others have a specific need you can fill. Sometimes you can refer a colleague to help with issues outside your area of expertise.

Follow Up

Think ahead to follow-up options. Of course, send a follow-up email thanking the client for the call and highlighting one or two points. Also, note any important information learned in the conversation in your contacts database. If you promised to do something, you should try to follow up within 24 hours.

If you've created a "reconnecting program," it should have what marketers call "strings," that is, it shouldn't be a one-shot deal. Think about asking the client if she would like another check-in call in a few weeks. Invite her to a Zoom webinar or roundtable focused on her issues. Send her a pertinent article, written by you or something from your current reading with a note saying what part is most applicable to her.

Defining Success

After a call, success could be the good feeling you'll have because you helped another person. Or, immediate work to resolve a problem. Or, the sense that you've solidified a relationship. Know that by highlighting your counselor side in a good way, you're reinforcing her impression of you as a knowledgeable, helpful, trusted advisor.

Platform for Growth

This kind of client touch program can create a platform for "new normal" growth in many ways. It could guide restructuring and prioritization of your practice offerings to meet your clients' needs. It could create immediate work opportunities. It could lead to an increase in word-of-mouth referrals as those you called tell others about the free time their lawyer spent with them.

Think of the program as an easy way to keep in touch with people you care about while showcasing your human side and your professional expertise. Connect, learn and relish the good feelings that come from helping others.

Carol Schiro Greenwald, Ph.D., is a marketing and management strategist, trainer and coach.

https://www.wealthmanagement.com/client-relations/reconnecting-clients-during-covid-19

Trust & Estates eNewsletter