

**HOW TO DEFINE,
IDENTIFY & FIND
YOUR “A+” CLIENT & GET
THEM TO RETAIN YOU**

SC Bar Solo CLE
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YOUR “A” CLIENT MAY NOT LOOK
LIKE HIS “A” CLIENT




HOW DO I IDENTIFY OUT WHO
IS MY “A” CLIENT?

- **Determine** the client characteristics you value
- **Define** those traits & characteristics
- **Identify** the clients who are likely to possess those traits

RATING SYSTEM

Develop a scale



**STRENGTHS
WEAKNESSES
PREFERENCES
INTOLERABLE TRAITS**

PARETO PRINCIPLE
"80-20 Rule"

**80% of your income comes
from 20% of your clients.**

PARETO PRINCIPLE
LAW FIRMS' COLLECTIONS

20 % of clients provide

80 % of REVENUE \$\$\$

PARETO PRINCIPLE TO C/D CLIENTS

80% of PIA clients


Provide only 20 % of Revenue

Who needs them?

PIA CLIENTS

PIA = P__ N In the A__ clients.

- Angry
- Bitter
- Unappreciative
- Ungrateful
- Claim no \$ to pay



PARETO PRINCIPLE

Most things in Life are not Distributed Evenly

- 20% of the clients produce 80% of our profits
- 80% of certain clients only generate 20% of our profits
- So, 20% of our efforts creates 80% of our results
- But, 80% of our efforts only generates 20% of our result

What is wrong with this picture?



FIRE these 80% dead weights!

Only represent new clients like your 20% clients who generate 80% of your profits!

100% GREAT CLIENTS!



100% GREAT CLIENTS!

OR, IF YOU ARE ROBERT ROSEN...



OR, IF YOU ARE ROBERT ROSEN...

RESULTS????

- More time to spend with your family
- Less burnout
- Feel appreciated
- Work is no longer a dreaded chore, but rewarding and fulfilling
- These clients often become friends at the end of the case
- You are rewarded for your hard work!

[TO BE CONT'D IN NEXT 10 MIN TALK]

FINDING THE A+ CLIENT

- Where do you find A+ clients?
- How do you market to your A+ clients?

Stay-at- Home Moms

- Give coffees or bag lunches through various organizations;
- Put up notices at prominent daycare facilities; or
- Put ads in local magazines & newspapers these women read.

Successful Businessmen & Businesswomen:
Therapists

- Obtain continuing education credit for your talk;
- Provide breakfast or lunch;
- Schedule the presentation at a convenient location;
- Offer a gift for person who brings the most professional colleagues.

CONTENT:
EXPLAIN FAMILY LAW

- Grounds for divorce in SC;
- How child support is calculated;
- Explain joint custody;
- Advise them about adultery as complete bar to alimony
- Explain condonation & how it impacts fault divorce
- Give them pointers on depositions & testimony

BENEFITS OF TALKS

- Get to know you;
- Will observe you in action;
- When they recommend you to their patient, they can honestly say they know you personally, not just through your reputation;
- They can become a huge referral source.

THE KEY...

- Be Sincere & Genuine
- Define your A+ clients
- Ask them to refer those people to you.
 - If you want DSS cases, **say so**;
 - You want to defend abused women, **say so**;
 - You prefer wealthier, high asset clients, **say so**.
- They will repay you & help their patients by referring them to a competent, knowledgeable atty.

Contact attorneys in other practice areas.

- Take them to lunch
- Tell them about your practice
- Be sure to tell them the type of clients you want to represent
- Write them a personal, handwritten thank you note after the lunch

OTHER IDEAS...

- Write articles & blogs
- Speak at CLE's
- Become known as someone with some knowledge about the area of law you are most interested in.
- Website: Make it define you & your practice.
-

SCREEN INITIAL CALLS

WARNING SIGNS

- REFERRAL SOURCE
- FINANCIAL
- COOPERATION
- ATTITUDE
- OTHER
- _____ TOTAL # OF WARNING SIGNS

REFERRAL SOURCE

- Internet/phone book
- Local bar referral service
- C/D-level Client

FINANCIAL

- "How much is the consultation/retainer?"
- "I know a cheaper lawyer."
- "Why do I have to pay consultation fee?"
- "My case is simple so can I have a special rate?"
- "Do you offer payment plans?"
- "I cannot pay you but my family has money & will pay my fees."
- "I have a lot of money but no access to it right now."

COOPERATION

- Switching attorneys or already had several attorneys
- Demands immediate
- Blame, Blame, Blame—No responsibility for own actions
- Guaranteed outcome
- Downplays the seriousness of their problem
- Know more about the law than attorney
- Evasive, untruthful, or contradicts own story
- Utilizes disproportionate amount of time during call

ATTITUDE

- Abrasive, argumentative, overly emotional, or abusive during questionnaire
- Has a bad attitude towards lawyers in general
- Displays a level of anger that is disproportionate to the matter
- Appears to be “seeking revenge” or hiding an agenda
- Difficult to please; nothing is good enough
- RUDE

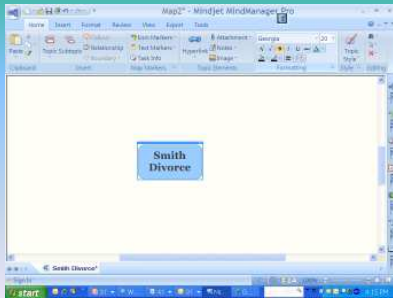
OTHER

- Criminal behavior/morally repugnant lifestyle
- Something is just “off” about them, or story doesn’t add up
- Appears emotionally or mentally unstable in general
- _____ TOTAL # OF WARNING SIGNS

A+ CLIENT NOTES

- Define & identify your A+ clients by using form in your materials.
- Use same form to identify all your C & D, and SERIOUSLY, fire them all!
- Market yourself to groups where you will find you're A+ clients or to sources who will refer A+ clients to you.
- Create your own screening system for potential clients with a scorecard sheet.
- [Use our scorecard sheet as a starting point.]
- Once you agree to take on a new client, have them sign an A+ client agreement in addition to your retainer, and use our form to help you draft your own document.

MINDMAPS



BEGIN ADDING ISSUES

