



Finding & Securing Legal Clients

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LIFE & CAREER COACHING
FOR LAWYERS

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FINDING & SECURING LEGAL CLIENTS WORKBOOK

Finding legal clients may seem daunting.

It's daunting because it's something new—not because it is insurmountable.

This workbook will provide you with the tools to not only find your ideal clients but will put you into the best position to secure them as your own clients.

Establishing your own client base is the best way to not only secure your seat at the table but will provide you with the ability to create your own unique space in the legal industry.

With that space comes the freedom to create the career of your dreams.

Cheers!

Autumn



FINDING YOUR CLIENTS

The biggest mistake I see lawyers make as they embark on client development activities is that they aren't clear on who they are looking for--

Who is your ideal client?

Do you know?

This worksheet will help you develop your ideal client avatar.

Do not skip this step!

Having clarity around your client will not only give focus to your marketing efforts but it will provide you with everything you need to know to find them and get their attention!



FINDING YOUR CLIENTS

1. Describe your ideal client business.

- What type of business are they in?
- How big is the company?
- Is it domestic, international or both?
- What size of legal/compliance departments does it have?
- Where is it headquartered?

2. Who is your ideal client contact? This may be the decision maker, or it may be the person who is going to connect you with decision makers. This does not necessarily have to be the person you will work with directly.

- Describe their professional life – job title, role, income level, responsibilities, etc.
- What do they look like – age, gender, etc.
- What does their personal life look like?



FINDING YOUR CLIENTS

- Who do they trust for business support – who do they go to with questions (e.g., coworkers, business team, CPA, banker, professional organizations)?
- What is their professional background? Where did they go to school? What training do they have?
- What do they do for fun? What types of organizations do they join?
- What keeps them up at night?
- What challenges them at work?



FINDING YOUR CLIENTS

3. Create a client avatar. Give them a name, image, and write their story here incorporating and expanding upon the above details.



FINDING YOUR CLIENTS

4. With your ideal client in mind, list 10 places you might be able to find them (or people close to them) and make a connection. This may be networking events, personal/professional organizations, social clubs, etc. It could be your kid's sporting events or it could be your local Chamber. Think outside the box. Where are your ideal clients? What are they doing at lunchtime or in the evenings? Where do they exercise? Where do they shop? Who are they meeting with when they have a simple business question?

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5. Identify two of the places above and write a plan to seek out your potential clients. Make it specific and commit to it for a stated period of time. For instance, it could be *I'm going to join the gym by X huge company and commit to going to fitness classes there and meeting the attendees. I will do this for 6 months and see if I make any good connections.* Or it could be *I'm going to post flyers at the Whole Foods next to Y huge company...I'm going to start attending events held by local CPA firms to see if my client attends...I'm going to speak at XYZ organization's event because I think my client may be there.*



SELLING STARTS WITH BELIEF

Even if you can find your ideal client, selling them will be *impossible* if you do not believe you have what it takes.

Have you ever caught yourself watering down your pitch or worrying that the client would never buy from you?

That is where your work must begin.

Your clients will never believe you can help them if you don't believe it first.

The following questions will help you access belief to help you start showing up with the confidence to secure your clients.

We start with your belief about yourself and then we will explore how to help you targets believe that you are the person to help them.



SELLING STARTS WITH BELIEF

1. In what ways do you help your client or could you help your ideal client?
2. In what ways can your firm help your client or could you help your ideal client? What practice areas are available to you and the client? What resources or information do you offer? Do you have access to other types of business support/contacts that could benefit them?
3. What are some problems a potential client might need you (or your firm) to fix? Where might they want your support? Be expansive here, it' not just about your services but your entire legal network.
4. What about this problem worries them? What are they afraid of?



SELLING STARTS WITH BELIEF

5. What could happen if clients do not address these issues?
6. In light of the above, list 10 ways you can tell a potential client what you and/or your firm do for your clients (make it clear and simple). This is what you will say when someone asks, *What types of legal services do you offer?*
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7. How do you want to feel when you offer to help potential clients?
8. What do you need to be thinking about yourself, your firm, and your potential client in order to feel that way in the moment?



SELLING STARTS WITH BELIEF

9. List 10 ways that you can offer to help a potential client. These are your selling statements that tell your potential client what exact problems you can fix for them.

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10. What would your potential client need to be thinking about you and your firm in order to take you up on your offer? This is their purchasing mindset.

11. If the goal is to get the client into the purchasing mindset, how could you revise/reframe your selling statements to get them into that mindset or to address that mindset?

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SELLING STARTS WITH BELIEF

12. What are the beliefs you want someone (your potential client) to have about you as an attorney? Write them all out here. Need help? What do YOU think right now about attorneys YOU admire? For example, *She is the right person to help me, I can trust her.*

13. Choose three beliefs from your list. Choose two beliefs that are the easiest to think and one belief that might be more difficult. Write each belief and all the reasons it could be true about you right now. Give yourself permission to believe great things about yourself.

- Belief 1:

- Belief 2:

- Belief 3:



SELLING STARTS WITH BELIEF

14. List supporting thoughts here for each of your three beliefs.

- Supporting Thoughts for Belief 1:

- Supporting Thoughts for Belief 2:

- Supporting Thoughts for Belief 3:



SELLING STARTS WITH BELIEF

15. If you were able to show up believing those thoughts every day, what would be different? How would you feel? What would you do or not do?

16. Which of those actions from the prior step could you implement now in order to strengthen your resolve and belief in yourself?

17. ON a scale of 1-10, how confident do you feel that you are the BEST person for your client to work with to address their concerns/challenges?



SELLING STARTS WITH BELIEF

18. Why did you rate it that number? Write down all your thoughts.

19. What would you need to believe to make it a 10?



SELLING STARTS WITH BELIEF

20. How can you start believing that today? Can you list any evidence indicating that the beliefs in the prior item might be accurate?



SELLING MINDSET

When you are pitching yourself to business prospects, you must always be aware of what you have to offer – and your value goes beyond your legal skills.

We all have our own unique skills to offer our clients.

There are hundreds of lawyers available to your clients – who they buy from comes down to their unique attributes and ability to authentically connect with the client.

The following questions will help you connect with your own unique value.



SELLING MINDSET

1. How are you valuable to your clients?
2. When you interact with your clients, how do you provide value in each of those interactions?
3. What distinguishes you from other attorneys with the same specialty?
4. What is interesting about you that could make you memorable to clients?



SELLING MINDSET

5. What aspects of your life could you incorporate into your conversations with clients or potential clients to help them connect with you and like you as a person?

6. In light of the above, what are 20 stories/anecdotes you are prepared to use when talking to clients or potential clients? Write out 20 (short) stories/themes that support who you are as an attorney, what knowledge you have and experience you have to lend. You want to find 20 stories about your experience as an attorney, your reason WHY you became an attorney, what is unique about you, 20 ways you can CONNECT with people you meet and your potential clients. Write the story ideas below. Then take those ideas/themes and get them out into the world over the next 30 days. They don't have to be specific to work projects or legal services, they can simply be memorable stories about who you are as a person. Remember it is about connection and making enduring relationships.



NETWORKING & MAKING CONNECTIONS

So now that you have found your clients and you are gearing up to talk to them and share one of your connection stories, discomfort kicks in.

No one wants to feel salesy or come off smarmy.

The following questions will help you to prepare for awkward networking discussions and provide you with the perspective to show up and make meaningful connections.



NETWORKING & MAKING CONNECTIONS

1. Who are you and how do you show up when you want people to be interested in you?
2. Who are you and how would you show up if you were being interested in other people?
3. What do you need to believe in order to stay connected with the people that you meet? Why is it important?
4. What are you hoping to get out of the relationship and how does that goal impact how you show up in the relationship?



NETWORKING & MAKING CONNECTIONS

5. How would you show up differently in the relationship if you weren't hoping to get something out of it?
6. In light of the above, who do you want to be in the relationship and how do you want to show up? What would you need to believe to show up in that way?



NETWORKING & MAKING CONNECTIONS

7. Sometimes the hardest part of networking is that initial opening. Openings can simply be commentary on the context (situations, news, setting), a genuine compliment about the person, a simple inquiry (*What time is it... Do you know where...*), commenting on shared experiences (*That speaker was amazing, what did you think about it...*), or a bold honest statement (*I'm Autumn, and I always struggle with these events, I get so uncomfortable. Does that happen to you?*). Brainstorm 10 simple openings that feel authentic to you that you can use in awkward situations:

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8. You may even decide to take your conversations deeper and ask questions to facilitate more discussion. For example, *What's the most adventurous thing you've ever done? If you could re-write your career, would you do the same work? What's an experience you think everyone should have at least once?* You can even set it up using some of or your ideas from the previous item: *I really don't love these types of events so I always come prepared with a question that I use to poll everyone I meet. My question today is...* Brainstorm 10 questions you can use to spark interesting conversation:

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EVALUATING YOUR EFFORTS

The only way to get better at selling is to keep practicing.

In order to maximize your efforts, you must evaluate each experience and identify where there is room for growth.

For each attempt at finding and securing clients, answer the following and track your efforts.

If you don't pay attention to your work, you won't notice your growth!



EVALUATING YOUR EFFORTS

1. What worked?
2. What didn't work?
3. What will you do differently?
4. What was hard about it?
5. Were you able to maintain your belief in your ability to sell? Why or why not?



EVALUATING YOUR EFFORTS

6. What do you want to learn from this?
7. How was this a success?
8. What advice would your future, successful self have for you with respect to this experience?

TRACKING AND FOLLOWING UP

Getting your own clients will require continuous effort and commitment.

This is a marathon, not a sprint!

Every connection you make is like a seed being planted – now you have to nurture it and attend to it!

You never know where your connections may end up 5, 10, 15 years from now.

Don't lose sight of the end goal. Maintain all the connections you make and develop a plan to continually invest in the relationship.

The following questions will help you evaluate your efforts and plan the next steps for each client target.



TRACKING AND FOLLOWING UP

1. CLIENT INFORMATION

- Name:
- Company:
- Position:

2. Date of Meeting and Meeting Nature (e.g., what, where, when):

3. What did I learn about the client/referral target? Include both personal and professional information – this will allow you to demonstrate that you were listening and are genuinely invested in the relationship!



TRACKING AND FOLLOWING UP

4. What went well with the meeting?
5. What was hard about it?
6. What will you do differently next time?

TRACKING AND FOLLOWING UP

- 7. How could you follow-up with the target to maintain the relationship?** *Examples: Sending a link to legal changes/updates relating to their work, inviting them to an event, sending them a thank you email and inviting them to stay in touch*

- 8. When will you contact the target again to reconnect/meet? Be specific here and set a specific date.**

- 9. How will you hold yourself accountable to maintain the connection and follow through on your plan to reconnect again?** *Examples: place time on your calendar to follow-up with them or ask your support staff to remind you.*

TRACKING AND FOLLOWING UP

10. What do you want to keep in mind for your next discussion with them? For instance, are you ready to ask them to work with you or are there important items you should follow up on when you next meet?





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