

# PURSUING—AND POACHING—LOCAL CLIENTELE

## NATIONAL EXPANSION

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**When you were a child, you probably never asked your parents, ‘where do clients come from?’ But now that you are a practicing lawyer, the question is likely front and center on a daily basis.**

And, by now, you have surely figured out that there is no legal practice stork who drops them off. Your practice cannot exist without them, so let’s take a look at the art—and strategy—of pursuing clients and the ethical considerations to be weighed before poaching them.

## ‘In the Beginning, There Were Referrals’

Perhaps, when you first opened your practice, you were lucky enough to get work from a family business or to otherwise be set up with your first clients. That’s not an uncommon scenario, but the key here—as it will be going forward—is networking the relationships that already exist. Perhaps friends have not yet experienced you—as the lawyer—but they nevertheless know you! By publicizing your new venture to family and friends by way of that archaic yet tried and true and effective technology—word of mouth—when they do need a lawyer, you will be on their radar not just as a friend but as a lawyer.

But why should they come to you when they already know so many other lawyers and may, in fact, be clients of another practice? Here is where the niche part comes in. Yes, people may know of many lawyers, but it is your specialty that must come to mind when people think of you as a lawyer.

## Web Content—Of Course

Although personal networking is a very important first step to getting those initial clients, and we tend to think that ‘everybody must know a lawyer...’, in fact, 57% of people searching for a lawyer first conduct a Google search. Here, the strategy

becomes a bit trickier because now you are presenting yourself to people who do not know you at all. So how does the prospective client know which lawyer to contact? Online reviews are the key here, and the way to get those positive reviews is by asking satisfied clients to please note their satisfaction with you and your professionalism in an online review. Numerous consumer rating sites exist, but it is advisable to regularly update your own website with the reviews or comments of satisfied clients after getting their approval. Along with your content and reviews, the services of an SEO expert are important to elevate your search engine ranking.

Some interesting statistics regarding the preferences of those searching for a lawyer: 79% of clients look for a lawyer who offers a remote contact option, while 67% look for a lawyer who offers both remote as well as in-person contact when needed.

## Emphasizing the YOU in YOUR Practice

Let’s go back to step one for a moment. The branding of your practice is not just about your legal expertise in your niche—although that is a critical element—but also about branding you and your personality. Developing personal relationships is a part of the client-attracting strategy that you

## Executive Summary

### › The Issue

What are the strategies that a lawyer should follow in order to pursue clients?

### › The Gravamen

It is through relationship building—whether in one’s family or among friends and colleagues—that a lawyer becomes known in his or her field.

### › The Path Forward

Developing relationships is an ongoing effort, and every client should be viewed as a potential returning client and referring client.

will need in order to attract and keep clients and get the holy grail of referrals from them. A personal connection 'humanizes' a practice that might otherwise be seen as merely a rather ordinary necessity. Even little things like holiday greetings, birthday wishes, and thank you notes can bring to the fore you and your personality and not just your practice.

### Plan Versus Strategy

Although the terms 'strategy' and 'plan' may appear to be two ways of describing the same thing, they are, in fact, rather different. A client marketing plan defines the specific actions that need to be taken in order to execute an adopted strategy, while the strategy explains the whys and principles underlying your firm's marketing efforts and drives your marketing steps. Your strategy should lay out goals, target client market, your practice's core message, and other essentials to attract clients via social media and other planning initiatives.

### Clients Who Are 'Already Taken'?

A young, Midwest sole practitioner attorney opened his office with just a few contacts with local realtors, yet by giving 110% attention to his clients' needs—including being available after hours and, to a certain extent, 'on call' when a 10:00 pm real estate contract would be freshly signed—soon developed a reputation among both realtors and young home buyers for his top-notch legal service. After just one year, he no longer had to advertise to the general public, and his practice

thrived based on repeat clients and referrals within his community.

But in addition, it was not uncommon for a client from the other side of a transaction to privately approach him after a closing and ask for his card! Several new clients were brought on board in this manner even though the attorney did nothing more than show up fully prepared, with all closing docs neatly organized, buyer-seller closing statements at the ready, and virtually all requirements of the title company cleared in advance. At times, this contrasted sharply with the attorney across the table being less than organized, fumbling through papers, and even not having informed his clients as to funds needed to close or proper ID for the title agent. The lesson? Your professionalism and your display of being organized and well-prepared can sometimes be your best new client magnet.

### The Poaching Predicament

There is a distinction between an attorney unabashedly going after another firm's clients as opposed to responding when those clients approach you. Clients can decide to leave one firm and go to another one for a variety of reasons, but among them is dissatisfaction with service or a desire to follow after a departing lawyer from the first firm. With competition for clients being as fierce as it is, and in some cases cutthroat, it is no wonder that firms might want to respond quite aggressively at the mere prospect of losing a client to your firm. Regardless of how you come to

## Action

### 1 What is Your Strategy?:

Know what your underlying goals and core messages are before you proceed with a plan to market yourself to the public.

### 2 Put the Plan Into Action:

Your web presence is essential, and in order to bring that presence front and center, you would be well advised to engage an SEO expert.

### 3 It's Not Just the Practice:

Be mindful of the fact that your practice is more than just your expertise in professional skills and technicalities but is also a reflection of you as the person. Relate to your clients at the personal relationship level and not just at the somewhat cold or distant 'services rendered' attitude.

### 4 Perfect Your Professionalism:

You don't just want to have a name in the legal marketplace, but rather, a reputation for professionalism, preparedness, and the 'lawyer everybody goes to', on account of providing top-notch service above and beyond the average.

attract the client who is already being serviced by another firm, you would do well to become familiar with ABA Model Rule 7.3, 'Solicitation of Clients'.

Solicitation, in fact, denotes merely a communication initiated by or on behalf of a lawyer that is directed to a specific person whom the lawyer knows needs legal services in a particular matter, accompanied by an offer that can be reasonably understood as offering to provide legal services for that matter. Although exceptions are made for soliciting family members, close personal acquaintances, or prior business or professional contacts, 'unsolicited' soliciting can result in unpleasant ethical ramifications. Such charges do little to enhance your reputation in the community and can, in fact, have just the opposite effect.

### **Making it Rain**

The focus on building your local practice should not be on how successful you were at completing a one-off transaction for a new client but rather on how to keep that client coming back—and referring others to you. Marketing might give you results for 'here and now', but true practice development looks to building an ongoing relationship with every client whom you are fortunate enough to have serviced. Maintaining that relationship and keeping that client in your recurring revenue stream should be the goal of your overall client pursuit strategy.

**“ONE WAY TO BUILD AUTHORITY AND CREDIBILITY IS TO WRITE AND PUBLISH REGULAR ARTICLES ON YOUR PRACTICE AREAS. CONSTANTLY PROVIDING ANSWERS TO LEGAL QUESTIONS ON YOUR FIRM’S WEBSITE, OR OTHER SITES, WILL GIVE YOU CREDIBILITY. WITH TIME, PEOPLE WILL RECOGNIZE YOU AS AN EXPERT AND TRUST YOU WELL ENOUGH TO ENGAGE YOUR SERVICES.”**

—NONYEREM IBIAM, LAWYER,  
CONTENT WRITER AND SEO EXPERT AT  
LAWTRULY

## Further Reading

1. <https://www.embroker.com/blog/how-to-get-clients-as-a-lawyer/>
2. <https://www.score.org/resource/blog-post/9-lawyer-marketing-strategies-attract-more-clients>
3. <https://www.clio.com/blog/law-firm-marketing-strategy/>
4. <https://legalrev.com/how-law-firms-can-attract-their-ideal-clients/>
5. <https://www.linkedin.com/pulse/effective-business-development-activities-your-law-practice-bais?trk=pulse-article>





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After receiving his Juris Doctor degree from The John Marshall Law School in Chicago, Mr. Brochin served as an Administrative Law Judge with the Illinois Department of Labor for six years where he presided over cases dealing with job separation issues and matters pertaining to contested Unemployment Insurance claims. He also co-wrote the agency's administrative rules, and periodically served as a 'ghost writer' for Board of Review decisions.

Following that position, he was Director of Development for a Chicago-area non-profit college where he was responsible for High Net Worth donations to the institution. For the next eighteen years he practiced as a solo practitioner attorney with an emphasis in the fields of Real Estate law and Commercial Contracts transactions, and was an agent for several national title insurance agencies.

In 2003 he was recruited to head up a U.S. title insurance research office in Israel, a position he held for four years, and between 2007-2017 he participated in litigation support for several high-profile cases. He has taught Business Law as a faculty member of the Jerusalem College of Technology, and has authored a wide variety of legal White Papers and timely legal articles as a professional legal content writer for GPL clients. Separate from his legal writing, he has co-authored academic articles on Middle East security topics that have been published in peer-reviewed publications.



## William H. Anderson, Esq.

MANAGING DIRECTOR

William Anderson is Managing Director and Head of Law & Compliance. He leads the GreenPoint practice in providing regulatory, legal, and technology solutions to law firms, legal publishers, and in-house law departments around the world, overseeing our team of experienced US attorneys and data and technology experts. Will has over 25 years' experience working with corporations to improve the management of their legal and corporate compliance functions. Will began his legal career as a litigator with a predecessor firm to Drinker, Biddle LLP. He then served as in-house counsel to Andersen Consulting LLP, managing risk and working with outside counsel on active litigation involving the firm.

Will has leveraged his legal experience interpreting regulations and appearing before federal (DOJ, SEC, FTC) and state agencies (NYAG) to oversee research and other areas at Bear Stearns. In this capacity, he counseled analysts on regulatory risk and evolving compliance requirements. Will also consulted on the development of a proprietary tool to ensure effective documentation of compliance clearance of research reports. Will then went on to work in product development and content creation for a global online compliance development firm pioneering the dynamic updating of regulated firms' policies and procedures from online updates and resources. Will holds a Juris Doctorate with High Honors from the Washington University School of Law in Saint Louis and is admitted to state and federal bars. He lives in Pawling, NY, with his wife and daughter.



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## About GreenPoint Executive Search and Recruiting

- Founded in 2001, GreenPoint Global offers a blend of proprietary technology and US-trained lawyers to provide advanced legal solutions to our clients. As part of GreenPoint Global, the GPESR team draws upon a deep knowledge base across multiple disciplines including Legal, Publishing, IT, Finance, and numerous other industries.
- By virtue of our unique methods and a proven history of providing top-tier legal services to our clients, the GPESR team is capable of supporting a diverse client base both in the US and globally. From solo practitioners to AmLaw 100 firms, legal publishers, Fortune 1000 companies, and in-house law departments, our team offers legal staffing solutions to suit any business needs. GPESR provides skilled attorneys in either permanent placements or temporary contracts through a selective recruiting process. Adherence to quality, value, and flexibility are hallmarks of our offerings.
- Ensuring privacy and security of client data is a critical component of our business. GreenPoint has instituted rigorous physical, administrative, and technical safeguards to protect the integrity, security, and privacy of client data, all of which comply with the most stringent US and global standards and regulations.

## About GreenPoint Law & Compliance

- GreenPoint Global was founded in 2001 and since that time has faithfully served an expanding roster of clients. GreenPoint leverages a unique combination of US-trained attorneys and proprietary technology to deliver a unique offering of skill and flexibility to meet client needs.
- Our core team of experienced US attorneys is based in Israel and works US hours. The breadth of experience of our attorneys ensures high-quality, cost-effective results across a wide range of legal, compliance, and regulatory matters.
- GreenPoint's methodology and proven track record of achieving client objectives has resulted in a broad base of clients in the United States, ranging from Fortune 500 insurance companies to solo practitioners, law firms, in-house law departments, and legal publishers. GreenPoint attorneys are selectively recruited and deployed based on possessing demonstrable subject matter expertise covering a broad spectrum of substantive US laws and regulations. The work product of our attorneys is thoroughly vetted internally before delivery to client. Adherence to quality, value and flexibility is at the core of our foundation.

