Ep #33: Connecting with Your Clients' "Why"

Full Episode Transcript

With Your Host

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As professionals gain experience in their particular domain, it's inevitable that they'll start to see patterns in what clients are looking for from the work that they do. And that insight is valuable, but it can lead to making assumptions about individual clients that, even if those assumptions are correct, jumping to conclusions can cut off an incredibly valuable opportunity to connect more deeply with your client and allow them to engage more fully with you.

In today's episode, I talk about the importance of giving clients the opportunity and really holding space for them to articulate their individual needs and worries and motivations for seeking your help. By taking the time to understand why someone is reaching out and what they hope to achieve, you can not only attract more of the right kind of work. But it will also help you engage the client around the things you need them to do, so you can deliver your services more effectively. Ready to become a more agile attorney? Let's go.

Welcome to *The Agile Attorney* podcast powered by Agile Attorney Consulting. I'm John Grant and I've spent the last decade helping lawyers and legal teams harness the tools of modern entrepreneurship to build practices that are profitable, scalable, and sustainable for themselves and their communities. Each episode I offer principles, practices, and other ideas to help legal professionals of all kinds be more agile in your legal practice.

I'm going to do a little bit of a quick episode this week because it's a holiday week when it releases. And there's something that keeps coming across my periphery that I think is important to talk about and it's the importance of leading or at least anchoring conversations and outreach in why statements or purpose statements. And you've heard me talk about this again and again. And even last week in my interview with Michael Clark, this came up.

But I wanted to really hit on it, I actually was on a thread's thread this morning. I'm trying to find that alternative to Twitter because I don't love what Twitter has become. And there was a person on there who is trying to build a following around how to content. And this particular thread that they posted was about how to set shortcuts on your iPhone. And they gave a nice explanation of the shortcuts app and step by step instructions about how to access it and how to set up shortcuts. And it was great as far as I could tell.

I didn't actually follow the steps and the reason why is, I didn't know and I still don't know what shortcuts are for on my iPhone. I know it's a thing that Apple has created. I know there's automations or whatever, but I don't really have the killer use case, and I wasn't alone. There were a lot of people in the comments saying, "Okay, great, give me an example."

And then there were a handful of other people that maybe had posted little things that they were using shortcuts for and frankly, none of them really resonated with me. And maybe you've got one, email me if you do. But again, I didn't really find a good case. But what was fascinating is, this person that originally posted the thread, the how to thread kept responding to these comments people were asking for examples and the person would say, "See the comments for examples or search around for it."

And it was totally maddening from my perspective because, look, I need to know what is in this for me. Why should I be paying attention? I don't care how good your how to content is. And again, objectively it was pretty good. I don't know why I should care about it. And it brings to mind another example and it's funny.

So, I have a client who has accused me in the past of talking about them when I bring up examples in the podcast. And I've assured them that I'm not actually talking about them, that there are patterns that I see over and over again. But this time you will certainly recognize who you are and yes, I am talking about you, but I'm going to keep it as anonymous as possible.

But I have a client who's working on sort of a rebrand and trying to refresh their marketing content, including a rewrite of a lot of the sections of the website including the lawyer bio for the owner of this firm.

And they sent me a version of the rewrite recently and it still, while I think the language was tighter, it was still sort of this typical lawyer bio around, I have this kind of experience. And I've got these kinds of accomplishments and I've done these sorts of cases or done this sort of training. And none of it really matters in terms of the client. I mean, I think there's some interesting things around it biographically where, yes, clients want to connect, they want to know you have certain experience.

But what I encourage this lawyer to do is, don't talk about what you've done, talk about why you do it. What is it that drives you in this practice? What about helping people through the particular sorts of problems you help with, is important to you. And by doing that, you're going to connect with people for whom those problems are also important. Because people want to find someone that's passionate and that is interested and engaged around the sorts of problems that they're trying to solve.

And it was interesting only because I've read that email right after I'd had a call with another client and I don't think this client actually listens to the podcast, but maybe they do. And so again you will know probably that I'm talking about you. But I think the example is a good one and this actually is something I run into with a lot of other lawyers, it just was sparked by this particular piece. And we were talking about that lawyer's intake meeting, that initial piece.

And I actually think it is a consultation and it doesn't really matter whether it's a free consultation or a paid consultation. I think there's good arguments for both depending on the nature of your practice. But it became clear to me, I mean, I haven't sat in on one of these consultations, but as we were discussing it, it was obvious to me that the flow of the conversation was very much about what the lawyer and their team was going to do to solve this legal problem. Was very much about describing the how of the process of doing this particular piece of legal work.

And my suggestion was that the lawyer and whoever was part of this intake discussion should think about spending more time talking to the client about their why. And actually, even that phrasing, talking to the client isn't the right thing. It is listening to the client about why.

Something Michael Clarke brought up in last week's episode. One of the really key indicators for him in terms of whether he's going to have a good relationship with a lawyer or whether a lawyer that he refers his clients to is going to be the right fit, is whether that person spends more time listening than talking in the early going.

And I think that's something that can be challenging for any professional because when you do a certain thing, when you solve a certain type of problem. There's a really pretty finite set of patterns that emerge about why people are engaging with you and reaching out to you to solve that problem. And it's really easy to make assumptions about, yeah, this is a person who fits this criteria and my knowledge and experience tells me that people who fit this criteria are usually trying to solve these types of problems.

And I think it's very natural, very human, to want to jump to those conclusions. And I'm not saying you shouldn't sort of jump to it or use your experience and judgment to assess the situation. But what I will say is that you jumping to the conclusion or making that assumption and sort of glossing over why the client has reached out to you to begin with, is not creating a great experience for that client.

I almost wonder if there's a thought process that happens. And I think it probably happens for me sometimes where we think that people are impressed by us when we can sort of anticipate their needs or predict the future. And they're like, "This person really gets me." And maybe that's true to an extent, but I think the more likely thing is that people want to be heard and people want to feel like you actually are listening and caring about their specific situation.

And so, my advice to this client was to come up with an agenda for that intake meeting or that initial consultation where, maybe after you're done with the chit chat portion of the thing, you transition into a really open-ended question. And my suggestion was to just throw it out there. So why are we here? Why did you reach out to me? And then let that question sit and wait for the person to answer it. And sometimes that answer might be really practical, really tactical.

If you're doing criminal defense and the person was charged with a DUI, then let them talk about that. But don't just say or don't jump to the conclusion that because you were charged with a DUI, you have all of these fears and worries and risks that you're trying to avoid. Give them time and space to talk about their specifics. I can't lose my license because my job is here or I've got to get my kids to school or I can't afford the penalties. And I'm making all this up because I don't actually have a client that does DUIs right now so I'm sort of drawing on distant memory.

But my point is, let the person get into their details and talk about the specific things that they're trying to either accomplish or the risks that they're trying to mitigate. And I can take this all the way back to episode six of this podcast where I talk about what clients really want from a legal service. And the Daniel Katz formulation of the only practical things that people are trying to solve when they reach out for legal help are to mitigate risk or to navigate complexity or some combination of those two.

And I think that's still right for most people most of the time. There's this slight flavor that comes up occasionally where people are trying to seize opportunity, but I think, mitigate risk is really the right formulation for most lawyers and most of the clients of those lawyers. And again, because you know your practice area, because you have experience working with clients in similar situations, you probably have a decent idea of what the risks are that people are experiencing when they reach out to you.

But it isn't enough for you to know them, it's really helpful to get the client to express them and I think it's helpful for a couple of reasons. Number one is that by getting them to articulate the concerns around their specific situation, you're actually helping them gain clarity. And by giving them the space and the time and the context and even maybe sometimes either the leading questions or the clarifying questions that let them really connect with, why am I here? You're allowing them to better understand themselves and better understand their own situation and that's incredibly valuable.

That's going to help you connect with that client and the client connect with you, as someone who is genuinely helpful, who is educating them and making them smarter about their situation. The other reason is that when you get that information and are able to help the client connect with their why, but also you understand what their motivators are, you can then use those motivators to help engage the client at later stages in the work that you're doing and the representation that will actually make your job easier and make their outcome better.

And I think I've talked about this before, I don't remember exactly what episode. But one of the challenges of almost any law practice that I've come across is that the client can lose interest in their matter. They think, now I've hired a lawyer to help me and I can kind of take a step back or not worry about this as much. And of course, the thing I talk about is that yes, the client is a customer to your practice, but they also are a team member, a resource on your project.

And in order to do the work that you do, you need to get things from the client, which means that you're almost constantly needing to re-recruit the client to their own cause, and there are a lot of things that I think can be helpful. And I think giving them a clear roadmap and setting expectations about when they are going to need to do work for you and when you're going to need feedback from them on the work that you've done, the drafts, whatever.

I think the thing that helps the most is if you can connect their phases of work to their motivation, to their why statements, to the specific risks that they're worried about or the specific complexities that they don't understand. Because those are the things that are going to get them to engage with the work and do the things that on the one hand, you need them to do, but really they need you to need them to do in order to accomplish whatever it is that they're trying to accomplish.

So, at the end of the day, it's about engagement, it's about connection, it's about purpose. And again, as I talked about last week with Michael Clark, it's about values. And people will find your help valuable when you connect with the things that they value. And taking the time to understand their why statements and their purpose statements and creating the space for them to articulate those things. Those are the things that are going to really help you create and maintain the engagement as you go through the entirety of your matter.

And taking it back to the first client, the one I mentioned earlier that's doing the rebrand. Branding is not about describing what you do. It's not about the colors or the logos or the font choices, or even describing the products and services that you have. It's about getting your ideal customer to connect with you and connect with your firm. And the reason people feel connection is when they have a shared sense of value and a shared sense of purpose.

And so, in your outreach, in your marketing, in your branding, in your conversations with clients, I think it can be just really critically important to continuously hit on why you do the work that you do. And I'll take a minute and take my own medicine and just reiterate that the reason I do the work that I do is that I want to help lawyers build practices that are profitable, but most importantly, sustainable. And ultimately scalable, should you choose to do so, but it's that sustainability that is so critical.

And yes, as I talked about last week, I have this access to justice component. And I really do hope that as you find a more sustainable practice, you will use at least some part of the capacity that we build together or that you're building based on what you're listening to in these podcasts. In order to do more good in the world for people who might not otherwise have access to the kind of help that you provide. But regardless of how you use it, you get to use it in the way that makes the most sense to you, and that will evolve over time.

What I really want is to make sure that you're running your law practice in a way that you can maintain for a long period of time. Because ultimately that's the thing that I think is going to help the most people in the world is by having lots of good helpers that are able to not burn out and really continue to do the good work over the course of a career.

One other quick note. I'm in the process of setting up a new section of my website that will be something of a discussion forum. I'm not exactly sure what form it'll take. It might be sort of an FAQ. It'll definitely involve a Q&A where listeners to this podcast and really any law firm owner, attorney, law practice professional can ask questions about the topics I'm covering in the podcast, or anything else having to do with your practice. It's not quite ready for prime time.

I actually have intended for a while to launch something of a group coaching offering. And I'm still in the process of figuring out what that should look like, but I've actually had a couple other things come up that are taking up my capacity in the fall. And so, I'm not currently looking to launch the group coaching until the first part of 2025. But I have already done some of the work to set up some of the forums and things on my website.

And so, I'm hoping in the next few weeks, certainly by October that I'll have this set up on my website. So, look for more information on that soon. If that's something that you have thoughts about or opinions or whatever, please reach out to me. You can always just shoot me an email at john@agileattorney.com. And I'm happy to engage with you on any of these topics.

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