



## Meet. Talk. Act

*A simple 3-step guide to  
winning new business*



# A simple 3-step guide to winning new business

**Date: Wednesday November 1, 2023**

One of the most common questions you get asked in today's tight economic conditions is:

How can I win more business?

More often than not, my response to this question is that the easiest way to win new business is to follow this 3-step process:

**Meet** – arrange to meet with your client(s);

**Talk** – talk with your client(s) at the meeting about their needs; and

**Act** – following your meeting, come up with an action plan of how to solve the needs of your client(s) AND make sure you implement the action plan.

## Step 1: Meet

Before you arrange to meet with any of your clients, undertake an audit of recent work you have done and who you have done it for. Once you have done this, talk with your knowledge and business development teams to identify clients you have who you could also be doing this work for.

Once you and your support teams have identified additional clients you could be doing similar for, select two or three with whom you have the strongest relationship. Arrange to call them and ask them if you could meet with them in the next few weeks to discuss how you might be able to assist them.

Keep in mind that their time is as important (if not more important) as yours, so before you arrange the meeting, make sure you have a clear understanding and expectation of what you want to get out of the meeting. Also, clients find it much easier identifying issues that may affect their business if these are highlighted in case studies of your recent work.

So, without breaching any client confidentiality issues, make sure you talk with your marketing team and ask them to create nicely branded case study handouts (unique to individual clients) rather than the usual “overview of services” handouts that seem to be the choice of preference for so many lawyers.

## Step 2: Talk

Once you have arranged a meeting with your client(s), make sure you prepare well prior to attending the meeting.

Again, ask your knowledge and business development teams to do some research on recent activities the client(s) has been up to and issues that have been of concern to them. Make sure you also find out which law firm(s) they have been using recently.

At the meeting, tell your good news story to the client(s) of recent ways you have been helping other clients in the same or similar industries to theirs. Make sure you express the value you have added to these clients, be it in money you have saved them or process improvements you have suggested they undertake.

While trying to make sure that you profile your expertise well with the client(s), keep in mind that this should not be all about you. You need to be spending a fair amount of the assigned meeting time listening to the client's concerns. This is when you will get your best insights into current operating issues facing the client(s) and should give you the opportunity to not only highlight how great you are but also how you and the client(s) can work together collaboratively.

## Step 3: Act

The most important of the three steps is the last one – act on your commitments.

Once you have met with the client, make sure you act on take-outs from the client meeting.

Too many people think that having a great meeting with a client is enough, and the ball is now in the client's court to call you with any work they want to send your way. This is not the case. You need to take some time out after the meeting to jot down three or four follow-up client action items.

These may include:

- sending news items that are relevant to the issues discussed;

- sending any marketing materials you have promised during the meeting;

following up on any training you may have promised about issues raised during the meeting, including proposed dates; and

diarising a follow-up call in your calendar 2 to 3 weeks after the meeting.

Provided you not only follow this simple 3-step plan but also continually act on it, you should find yourself winning new business from your clients!

---

*The information contained in this article is of general nature and should not be construed as legal advice. If you require further information, advice or assistance for your specific circumstances, please contact us.*