

# Pick Up the Phone: Make a Call in a Technology-Driven World

If I told you to pretend that you're on a phone call, how would you hold your hand?

My thumb and pinkie finger stick out while my other fingers fold into my palm, and I hold my thumb up to my ear to listen, with my pinkie serving as the speaker.

My children just hold their hands out flat and talk.

Seeing this play out got my attention for two reasons. First, let's just be honest: It makes me feel old. Second, it made me wonder how often my kids actually see me talking on the phone, because it's pretty rare these days. Technology has made it easy for me to multitask. I can order groceries, check email, confirm an appointment, and text my friend a happy birthday, all while supervising my children outside. But am I really present while doing any of those things? Am I adding value to any of my relationships?

## The Value of Picking Up the Phone

It's not a well-kept secret in our industry that clients want their attorneys to be responsive – there are so many articles and anecdotes about this point. But they also want those attorneys to be proactive. So why – especially in a time when our news feeds are filled with articles pondering whether [robots will take legal jobs](#) – is reaching out still an issue? When a key element that differentiates humans from AI is the ability to have a conversational relationship, why do legal marketers still have beg and bribe attorneys to pick up the phone and call their clients?

BTI Consulting recently published an [article with 17 reasons why lawyers don't call their clients](#). The reasons include a lack of time, not knowing what to talk about or just thinking email is easier.

Of all the tools in the marketing and business development toolbox that we use, direct outreach is simple, personal and efficient from cost and time perspectives. The easiest way for attorneys to get new business is from existing clients who already know the firm and the quality of the work. If you aren't encouraging your attorneys to have regular, real-time contact with their clients, you should be. Even a mixture of phone and email conversations is acceptable as long as there are regular touchpoints. The intention is not to inundate clients with information or annoy them, but to continue to show an interest in their business and the value you place on the relationship.

Another BTI Consulting survey indicated that [RFPs are currently on the decline](#), with only 11.2% of respondents noting they were preparing to issue an RFP. Only 10.2% were considering issuing one, which is down from 30% in 2020. So how are clients outsourcing



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their legal work? According to BTI, by using their current law firms and seeking referrals from peers. This means client service is more important than ever – and picking up the phone just to check in has the potential to generate more business.

## Best Practices for Client Outreach

Now that we have a business case for picking up the phone, how do you get your attorneys to start doing it?

Initially, present the business case at one-on-one discussions, coaching sessions, practice group meetings, etc. Pull a list of the attorney's or group's top five to 10 clients and ask the last time somebody spoke with somebody from that company in person or on the phone. If it's been more than three months, highlight that client name and assign somebody to reach out. Keep working down the list.

Provide options for outreach. If your attorneys haven't reached out, it's probably due to one of the 17 reasons identified by BTI. Give your attorneys more ways to opt into connecting with their clients. Stress that contact **must** be attempted on the phone before sending an email. Remind the attorneys that we don't want emails getting lost in inbox purgatory. You will probably get some pushback, so here are a few scenarios that will empower your team to make the call.

*Scenario 1: They don't know what to talk to the client about; it feels like a cold call.*

For attorneys who don't know what to talk to their clients about, ask them to list the top three things that their clients are probably losing sleep over right now – legislation, full dockets, labor issues. Odds are, they'll have a list longer than three, and boom, they just developed a script. Wouldn't it be nice if somebody was thinking about problems you might be facing and called you, unprompted, to offer a solution?

Reaching out to a client to discuss an issue they might be facing shows an understanding of their business, especially if it's not an area you've handled work in previously. It also allows them to vent a little and may provide some insight into other issues they are navigating, which is a great opportunity for [cross-selling your firm's services](#). Even if there is nothing currently in the works, this simple conversation could put the firm top of mind for the next issue that does arise.

*Scenario 2: I don't want to bother them. They'll call us if they need us.*

We all know that most companies enlist the assistance of more than one law firm for their legal needs, so if they aren't calling you, they're probably calling somebody else. Think about it. If you're in a bind, do you pick up the phone and call somebody for help whom you haven't spoken to in eight months? Or somebody you've engaged with more recently?

Legal decision-makers are juggling a variety of needs and demands, so it's easier for them to look to firms they have experience with and can trust as a first stop. It might seem intrusive for an attorney to check in to see what their plates look like and ask, "Is there anything my firm could do to help?" But for the client, it could actually alleviate some of their workload.

*Scenario 3: I'll just send them an email. It takes less time.*

Rarely do I come away from a 20+ email exchange thinking, "Wow, what a productive and great chain that was."

All of our inboxes are inundated, so encourage your attorneys to reconsider their emails over the next few months. If they are addressing more than two items, tell them to pick up the phone. If the client doesn't answer, encourage them to leave a voicemail explaining that they wanted to discuss something that was easier to do via phone than email. An email can be sent afterward to recap and document the discussion. Odds are, the call will touch on something valuable that wouldn't have been included in an email, whether about the matter or a shared affinity for baseball. Never underestimate rapport.

*Scenario 4: We already ended the matter.*

If it wasn't too long ago, reach out for feedback. You'll demonstrate a desire to keep improving. Relationships take time to build; one matter may not have given both sides time to figure each other out. Don't just focus on the results, either. Ask questions about value and communication. If there is negative feedback, don't ignore it – address how it will be resolved from now on. Clients want transparency and clarity in how their work is being handled, and that should also extend to how performance will improve.

Another excuse to call a client with no active matters could be asking them to serve as a reference for rankings that request client feedback. This can be a valuable touchpoint if you handle it the right way, e.g., not emailing them two years after a matter ended. Show them that you enjoyed the work and that you value their opinion.

We are all mindful of our clients' time and want to provide as much value as possible, but let's not overthink things. If executives and general counsels are consistently asking for their legal teams to be more responsive and proactive, picking up the phone – yes, old school, I know – is a great starting point to nurture relationships.

If you need ideas about how to start these conversations or encourage your team to connect with their clients more frequently, reach out at [mbsmith@jaffepr.com](mailto:mbsmith@jaffepr.com). You can even call me at 814.880.9398.