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**BUILDING A  
PROFITABLE CLIENT BASE:  
Best Law Practice  
Management Tips  
&  
Professionalism and Civility**

**William J. Price  
Elk & Elk**

# HOW TO BUILD A CLIENT BASE?

WILLIAM J. PRICE  
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- I. Where to begin.
  - a. Philosophy:
    - i. Mind Set:
      - 1. Practice of Law is “need base”
      - 2. Make the client aware you are out there before they need you.
      - 3. To be successful- lot of hard work.
    - ii. Proactive:
    - iii. Hustle
    - iv. Face to Face Interaction
  - b. Focus of my practice: What am I marketing?
    - i. Area of practice?
  - c. What are my selling points?
    - i. What sets my practice apart?
      - 1. Quality of Service;
      - 2. Work Product;
      - 3. Timeliness;
      - 4. Cost;
      - 5. Experience;
    - ii. What if I do not have a ton of experience?
      - 1. How do I set myself apart?
        - a. What do clients want from lawyers: Make the list?

- b. What do other lawyers fail to do well: Look in the Green Book;
- c. How can I exceed their expectations
- d. Experience

- iii. Character Traits

- 1. Competent;
- 2. Aggressive;
- 3. Protective

- II. Business Plan Part I: Blue Print to Obtaining Clients

- a. Easiest Referral Sources:

- i. Family/Friends/Law School Classmates
- ii. College Friends
- iii. Social Media Platforms:

- 1. Linked In
- 2. Facebook
- 3. Other Platforms

- b. Data Base:

- i. Outlook:
- ii. Evernote:
- iii. Essential Information:

- 1. Phone number and Email
- 2. Addresses

- c. Topics to Discuss:

- i. Thoughtful/Empathetic/Needs/Gestures/

- d. What do I do with these contacts:
  - i. Advise them what you do for a living:
  - ii. Provide them advise or help
  - iii. Send them notes on the basic occasions: birthday, holidays, and special occasions.
  - iv. You have to become creative

### III. Business Plan Part II: The Master Calendar:

- a. Every Month: Create a task list:
  - i. Basics: birthdays to other important dates:
  - ii. Plan out the months 60 days ahead as to what you want to accomplish and who you have to reach out to.
  - iii. Mark on Calendar important tasks to be completed:
    - 1. Examples:
      - iv. Create Creative/Cool Ways to stay relevant in people's lives
- b. Block off time where you have to work on cases or receive training
- c. How often should I work on marketing?
- d. Other?

### IV. Business Plan Part III: How to Add to Your Contact List:

- a. Everyday life:
  - i. Make a note of everyone you run into;
  - ii. Connect on Social Media or other platform;
  - iii. Send a hand written note.
  - iv. First impression- WOW them
- b. Organizations:

- i. Passionate about;
    - ii. Active;
    - iii. Meet one to two people a time;
    - iv. Do not “over-do” it.
  - c. What do I do after the meeting?
    - i. Add information to your note;
    - ii. Can you use the information creatively to stay active in their lives;
- V. Business Plan Part IV: How to stay relevant in a contact’s life:
  - a. Face to Face Meeting:
    - i. More of a personal relationship v. professional relationship;
    - ii. People do business with those people they trust;
  - b. How often do I meet?
  - c. Other ways to stay in contact with them?
    - i. email;
    - ii. card;
    - iii. events;
- VI. Business Plan Part V: Key Points:
  - a. How to speak to a potential Client and a potential referral source:
    - i. Gather as much information as possible;
    - ii. Ask as many questions as possible;
    - iii. What information is important:
      - 1. Basic:
        - a. background: family, education, job,
      - 2. Important:

- a. Stress/Anxiety/Worry;
- b. What they need help with;
- c. What mistakes could you alert them too?
- d. How can you help them

b. Social Media/ Internet:

- i. How to make the most of it?
- ii. What steps to take?
- iii. What not to do?
- iv. How to be relevant in social media.

c. What are you trying to achieve:

- i. Reliable;
- ii. Dependable;
- iii. Helpful;
- iv. Respectful;
- v. Responsive;
- vi. Honest;

VII. Conclusion:

- a. Goals:

# **New Lawyers Section**

The New Lawyers Section provides a forum for addressing issues affecting newer lawyers (under 5 years in practice), sponsors educational programs for those newly in practice, and provides social and networking opportunities for newer attorneys. The Section also offers leadership opportunities and pro bono and community service projects.

The New Lawyers Section typically meets on the 4th Wednesday of each month (excluding December, July and August) at 11:45 a.m. at the Akron Bar Association office.

## **Resources**

Law Library Membership Request  
Akron Bar Association Calendar  
LinkedIn New Lawyers Section Group Page  
New Lawyers Section Facebook Page  
Leadership Academy  
Attorney 911

## **Contact**

Thomas Christos Petropoulos  
Member Engagement Coordinator  
Akron Bar Association  
(330) 436-0106

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## A LAWYER'S CREED

TO MY CLIENTS, I offer loyalty, confidentiality, competence, diligence and my best judgment. I shall represent you as I should want to be represented and be worthy of your trust. I shall counsel you with respect to alternative methods to resolve disputes. I shall endeavor to achieve your lawful objectives as expeditiously and economically as possible.

TO THE OPPOSING PARTIES and THEIR COUNSEL, I offer fairness, integrity and civility. I shall not knowingly make misleading or untrue statements of fact or law. I shall endeavor to consult with and cooperate with you in scheduling meetings, depositions and hearings. I shall avoid excessive and abusive discovery. I shall attempt to resolve differences and, if we fail, I shall strive to make our dispute a dignified one.

TO THE COURTS and OTHER TRIBUNALS, and TO THOSE WHO ASSIST THEM, I offer respect, candor and courtesy. Where consistent with my client's interests, I shall communicate with opposing counsel in an effort to avoid or resolve litigation. I shall attempt to agree with other counsel on a voluntary exchange of information and on a plan for discovery. I shall do honor to the search for justice.

TO MY COLLEAGUES in the practice of law, I offer concern for your reputation and well-being. I shall extend to you the same courtesy, respect, candor and dignity that I expect to be extended to me.

TO THE PROFESSION, I offer assistance in keeping it a calling in the spirit of public service, and in promoting its understanding and an appreciation for it by the public. I recognize that my actions and demeanor reflect upon our system of justice and our profession, and I shall conduct myself accordingly.

TO THE PUBLIC and our SYSTEM OF JUSTICE, I offer service. I shall devote some of my time and skills to community, governmental and other activities that promote the common good. I shall strive to improve the law and our legal system and to make the law and our legal system available to all.

## A LAWYER'S ASPIRATIONAL IDEALS

AS TO CLIENTS, I shall aspire:

- a) To expeditious and economical achievement of all client objectives.
- b) To fully informed client decision-making. I should:
  - 1) Counsel clients about all forms of dispute resolution
  - 2) Counsel clients about the value of cooperation as a means toward the productive resolution of disputes
  - 3) Maintain the sympathetic detachment that permits objective and independent advice to clients
  - 4) Communicate promptly and clearly with clients, and
  - 5) Reach clear agreements with clients concerning the nature of the representation.
- c) To fair and equitable fee agreements. I should:
  - 1) Discuss alternative methods of charging fees with all clients
  - 2) Offer fee arrangements that reflect the true value of the services rendered
  - 3) Reach agreements respecting fees with clients as early in the relationship as possible
  - 4) Determine the amount of fees by consideration of many factors and not just time spent, and
  - 5) Provide written agreements as to all fee arrangements.
- d) To comply with the obligations of confidentiality and the avoidance of conflicting loyalties in a manner designed to achieve fidelity to clients.
- e) To achieve and maintain a high level of competence in my field or fields of practice.

AS TO OPPOSING PARTIES and THEIR COUNSEL,  
I shall aspire:

- a) To cooperate with opposing counsel in a manner consistent with the competent representation of my client. I should:
  - 1) Notify opposing counsel in a timely fashion of any canceled appearance

- 2) Grant reasonable requests for extensions or scheduling changes, and
  - 3) Consult with opposing counsel in the scheduling of appearances, meetings and depositions.
- b) To treat opposing counsel in a manner consistent with his or her professional obligations and consistent with the dignity of the search for justice. I should:
- 1) Not serve motions or pleadings in such a manner or at such a time as to preclude opportunity for a competent response
  - 2) Be courteous and civil in all communications
  - 3) Respond promptly to all requests by opposing counsel
  - 4) Avoid rudeness and other acts of disrespect in all meetings, including depositions and negotiations
  - 5) Prepare documents that accurately reflect the agreement of all parties, and
  - 6) Clearly identify all changes made in documents submitted by opposing counsel for review.

AS TO THE COURTS and OTHER TRIBUNALS, and TO THOSE WHO ASSIST THEM, I shall aspire:

- a) To represent my clients in a manner consistent with the proper functioning of a fair, efficient and humane system of justice. I should:
- 1) Avoid nonessential litigation and nonessential pleading in litigation
  - 2) Explore the possibilities of settlement of all litigated matters
  - 3) Seek noncoerced agreement between the parties on procedural and discovery matters
  - 4) Avoid all delays not dictated by competent representation of a client
  - 5) Prevent misuses of court time by verifying the availability of key participants for scheduled appearances before the court and by being punctual, and
  - 6) Advise clients about the obligations of civility, courtesy, fairness, cooperation and other proper behavior expected of those who use our system of justice.

b) To model for others the respect due to our courts.

I should:

- 1) Act with complete honesty
- 2) Know court rules and procedures
- 3) Give appropriate deference to court rulings
- 4) Avoid undue familiarity with members of the judiciary
- 5) Avoid unfounded, unsubstantiated, or unjustified public criticism of members of the judiciary
- 6) Show respect by attire and demeanor
- 7) Assist the judiciary in determining the applicable law, and
- 8) Give recognition to the judiciary's obligations of informed and impartial decision-making.

AS TO MY COLLEAGUES IN THE PRACTICE OF LAW, I shall aspire:

- a) To recognize and develop a professional interdependence for the benefit of our clients and the legal system
- b) To defend you against unjust criticism, and
- c) To offer you assistance with your personal and professional needs.

AS TO OUR PROFESSION, I shall aspire:

- a) To improve the practice of law. I should:
  - 1) Assist in continuing legal education efforts
  - 2) Assist in organized bar activities
  - 3) Assist law schools in the education of our future lawyers, and
  - 4) Assist the judiciary in achieving objectives of *A Lawyer's Creed* and these aspirational ideals.
- b) To promote the understanding of and an appreciation for our profession by the public.  
I should:
  - 1) Use appropriate opportunities, publicly and privately, to comment upon the roles of lawyers in society and government, as well as in our system of justice, and

- 2) Conduct myself always with an awareness that my actions and demeanor reflect upon our profession.
- c) To devote some of my time and skills to community, governmental and other activities that promote the common good.

AS TO THE PUBLIC and OUR SYSTEM OF JUSTICE,  
I shall aspire:

- a) To consider the effect of my conduct on the image of our system of justice, including the effect of advertising methods.
- b) To help provide the pro bono representation that is necessary to make our system of justice available to all.
- c) To support organizations that provide pro bono representation to indigent clients.
- d) To promote equality for all persons.
- e) To improve our laws and legal system, by for example:
  - 1) Serving as a public official
  - 2) Assisting in the education of the public concerning our laws and the legal system
  - 3) Commenting publicly upon our laws
  - 4) Using other appropriate methods of effecting positive change in our laws and the legal system.