



*How to Take Advantage of Client Calls to*

# MARKET YOUR PRACTICE

TIPS TO HELP YOU BE ORGANIZED AND EFFICIENT.

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**WHETHER YOU'RE A SOLO PRACTITIONER OR A LAWYER AT A SMALL FIRM**, client calls provide an excellent opportunity to market your practice and build your brand. Not only do they give you an opportunity to show clients your commitment and dedication, but they will also help position you as an organized and efficient legal counselor. Here are some tips on preparing for and excelling at these calls regardless of the size of your firm.

**1. Lay out a plan for the call.**

Prepare an agenda with a list of the important topics you need to cover in the limited time you have with the client. Share it with your colleagues and the client before the call begins. By sharing it with the client and your team beforehand, you allow everyone to be prepared

for the call, ensuring you have a productive conversation.

**2. Start the call off on the right foot.**

Set yourself up to have a successful call by joining early. Doing so will give you time to take a deep breath, center yourself for a moment, go over your talking points, and show up mindfully to the call. You will also be in a good mood, rather than appearing to be the distracted outside counsel, too busy to truly focus on the client or their concerns.

**3. Focus on the substantive issues.**

On your client calls, limit the substantive discussion to just two or three topics that can realistically be covered and resolved within the time allotted. If more time is

needed to discuss any of these items, or if you need more information before deciding on an issue, suggest scheduling a separate call dedicated to that topic.

You could also let the client decide, noting that this may take longer than the time allotted, indicating that you are happy to stay on longer to discuss this more in detail, and asking the client's preference. Clients always appreciate it when you're mindful of their busy schedule.

**4. Schedule some post-call time for yourself.**

Block off your calendar for 30 minutes after the end of the client call to draft a document that focuses on the issue, decisions made, and upcoming action items. You may also take this time to draft up any notes to send around to the client or the internal team, start working on some of the quicker next steps from the call, and get ready for your next call of the day.

Doing this right after the call, and while your memory is still fresh, will help you be better organized. If your calendar is blocked off, you have free space to stay ahead on your action items, allowing yourself to stay on top of your client's needs.

These tips are simple to implement but they will provide myriad positive effects. Not only will they help you become known as an organized and efficient lawyer, but they will also make meetings more productive and helpful for all parties involved. Without a doubt, your clients and colleagues will notice and appreciate your efforts. **TBJ**



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