



Acquiring and Keeping Good Clients

UT Law CLE
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What is the difference?

Acquiring vs Keeping Clients



- How You Categorize Your Practice Across Three Dimensions with
- How You Characterize Your Prototypical Client
- Serves as the Foundation of Efforts to Both Acquire and Keep Good Clients



Practice Characteristic Sets

- How Many Transactions or Matters Do You Handle for Each Client?
- What is the Total Annual Volume of Transactions or Matters You Handle?
- What is the Median Price Tag Per Transaction or Matter You Handle?
- What Kind of Person/Company is Your Typical Client?

Practice Characteristic Sets

	Personal Injury Litigation	Debt Collections	Niche Business Transactions
Total Trans Per Year	5 trials/Yr 10 settlements/Yr (Low)	3 trials /Yr 100 settlements/Yr (High)	15 transactions -- multi part (Low)
Total Trans Per Client Per Year	1 Per Year or Ever (Low)	20 Per Year (High)	1 Per Year (Low)
Median Price Tag of Trans	Medium to High	Low	Medium to High
Prototype Client	People Doing Physical Labor Or All Auto Drivers	Businesses with Higher Customer Volume	Entrepreneurs Or More Established Businesses
	Assumes solo or small firm	Assumes solo or small firm	Assumes solo or Small firm



Who is “You”?

- Depending on the Size of Your Firm, “You” may be an individual lawyer, a section of the firm or the entire firm
- You may need to find a Practice Characterization Set for two or more areas of your firm’s practice
- You may need to identify more than one prototypical client



Total Volume of Transactions or Matters for the PCS

- How Many Attorneys Are Working?
- What is the Level of Experience of the Attorneys?
- What Measures Affect the Cost Profile of the PCS?
 - Is There Anything Repetitive or Logistical That Could Be Done By Smart Non-Lawyers?
 - Is There Any Tactic in Organizing or Specializing the Work Flow Such As One Subset Doing All the Drafting and Research While Another Subset Applies the Document to Each Client?
 - Are There Technology Apps That Increase Productivity in This Type of Practice?



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First appeared as part of the conference materials for the
2018 Managing Your Success: Practice Management at the Next Level session
"Keeping Good Clients"