



# HOW TO GET OLD CLIENTS TO FOLLOW YOU TO A NEW FIRM

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It's now common for professionals to move their practice from one firm to another. In fact, I know some senior lawyers and accountants who've switched theirs three or four times over the past decade. Each time they do, there's an expectation they will take many of their clients with them. But the truth is, for one reason or another, that doesn't always happen. And when it doesn't, the new firm often gets a little peeved and the professional a little red faced.

[Mills Oakley's](#) CEO, John Nerurker, has welcomed more lateral hires than probably any other law firm in Australia. His advice...

*"The bottom line is partners need to put themselves in the client's position and understand their concerns about a change of firm. That may mean some fairly candid conversations about why the move is happening – but sometimes that is the best way to build trust."*

So if you're thinking about switching teams anytime soon, how should you go about it? Find out in our guide to making sure old clients follow you to a new firm.

## 1. ADJUST YOUR EXPECTATIONS

Let's get this out of the way early: you are not going to take everyone. It just never happens. Some clients will *want* to stay with your old firm, some - due to panels, higher level agreements or company policy *will be forced* to stay with your old firm, and some will simply find it easier to keep doing what they've always done and simply *won't care* enough about you to move. If you manage to transition two-thirds of your work across, you're doing extraordinarily well.

But don't expect that to happen on day one. Even many of those that do come with you won't come straight away. They'll wait for the right time to make a break. They could even choose to use you both for a while, and test you both, so be sure to dazzle

## 2. GET YOUR STORY STRAIGHT

It shouldn't surprise you that some clients will want an explanation of why you're moving on. And guess what? If you want them to pay your bills, I think they're entitled to one. By that, I don't mean that you should give them the kind of PR guff they could read anywhere - the stuff like, "oh, it's a better cultural fit for my practice and we'll be able to service you better."

I mean the truth. If you're leaving because you like the new guys better, be upfront and tell them why. (Without slagging off your current mob, of course). If you're leaving for a better slice of the pie, tell them that too. If you really are their trusted adviser they won't care that more of what they're paying you goes into your pocket and not into the firm's. Or, if it really is for "cultural reasons" or "better service" explain what that means for them - come up with an explanation in normal language that you can say with a straight face. Don't parrot what's in your press release.

### 3. ADDRESS THE CONCERNS YOU KNOW THEY'LL HAVE

It also shouldn't surprise you that clients will want to know how your move will affect them directly. And generally, my experience is that every client will be concerned about two things. The first is price. Will your fees be going up or down or staying the same when you move? The second is that they'll want to know what will happen to their existing files. Will they be coming across with you? What happens if they don't?

There's often a lot of red tape involved in releasing and moving files and your client won't want to be burdened with that. They'll also want to make sure their IP is secure.

### 4. GET READY FOR SOME CURLY QUESTIONS TOO

Chances are they'll have some more specific questions too. For instance, if you're leaving on your own they'll want to know why your team isn't following you. And why shouldn't they want to know that? They're likely to have more day-to-day dealings with your staff than with you, and the skill of your employees is no doubt a big part of why they use you in the first place.

They'll also probably want to know about any process changes accompanying the move. Who will be their key touch points now? Who do they call if they need something on short notice? Are their terms of payment the same?

### 5. INVOLVE OTHERS

If you're taking a team with you, try to get them involved in this whole process, so they know why you're moving and have a clear idea about why they are too. Call a meeting and begin brainstorming what you're going to say. It may sound corny, but I'd even suggest some good old-fashioned role-playing, where you anticipate what clients are going to ask and workshop your responses among the group. You should also make sure that everyone is **authentic** when they respond.

There may be a number of reasons for the move and some may be more important than others to staff members. Make sure your people have a clear idea of why they moved with you, as well as a clear and detailed picture of what it means for the client practically.

### 6. THINK LIKE A START UP AND HAVE A 100 DAY PLAN

The first hundred days in the new job are going to be critical. They're also going to be tough. You'll be trying to bring across your existing clients at the same time as you're busting an absolute gut to prove your worth to your new firm. The only way you'll be able to survive is if you have a plan. Not the type of plan you dusted off for performance reviews at the old place - you need to think [more like a start-up](#) .

*Focus on less and then obsess. (Hansen, M 2018)*

Make a rule that for a certain number of days will be about client work, a certain number are about visiting clients, and a certain number are about making sure your team is working towards the same goals. Whatever you do, give yourself some concrete objectives and make sure you measure yourself against them.

When you do, always remember, it's not just your clients who determine the success of your practice; it's your referrers too. So when you work out who you need to speak to and what you need to say, be sure to include these guys too.

## 7. ACT HONORABLY

Almost every professional these days is bound by confidentiality agreements, non-competes and similar devices designed to make sure they don't damage their existing firm too badly when they walk out the door. No matter how tempting it is to breach these, don't do it. Acting honorably wins respect of the people who matter and makes them more likely to follow you. People will notice that you respect your obligations and, the good ones, will trust you more for that.

On the flip-side, acting against your word will get you noticed for all the wrong reasons. It may sound harsh but my view is that professionals who bend the rules attract grubby clients.

## 8. BE PATIENT

Finally, just remember that the process of transitioning clients takes time. Even those who do come with you may take 12 months before they're sending work your way. So, unless you're presented with a smorgasbord of work from your new firm, expect to take a dip in the fees you're billing, at least for the first little while. Don't panic when that happens. Instead, put in place the 8 steps above and you'll soon be back on track - or hopefully - ahead of where you were before you left.

In the meantime, take inspiration from the words of a famous TV ad: [it won't happen overnight but it will happen.](#)

## FURTHER READING

Hansen, M (2018) [How to Work Smarter Not Harder](#)

Waller, D. & Younger R. (2017) [The Reputation Game: The Art Of Changing How People See You.](#) One World Publications: London, United Kingdom.

Lawyers Weekly Podcast (12 May 2021) [Knowing When to Close Your Firm and Go Back to a Bigger Practice](#)

## WANT MORE?

Our practice on-boarding service gives lateral hires the intensive support and advice they need to hit the ground running. If you want to know how it could help you or your firm, [get in touch.](#)

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