

How to Interview Prospective Clients: *Focus on their Problems & Your Credibility For Success*

By Trey Ryder

If you spend most of the interview telling prospects about your services, you're going about it all wrong. Your prospect's first priority is to understand his problem.

Successful lawyers spend up to 70 percent of interview time educating prospects about the magnitude of their problem and the risks of allowing it to persist. You win more new clients when you focus on their problems and follow these 17 steps:

Step #1: Give your prospect your undivided attention. This means no interruptions of any kind. If you can't give your prospect your full attention, then delay the appointment until you can. You must be a good listener and make your prospect feel as if he is the most important person in the world.

Step #2: Build rapport with your prospect. Try to sense your prospect's mood and respond in a helpful, caring manner. This lowers your prospect's resistance and forms an emotional bond that brings you closer together. One of my clients begins his interviews by saying, "Tell me about yourself." This gets the prospect talking and takes the focus off the attorney.

Step #3: Put yourself in your prospect's position. The best way to understand what your prospect feels is to imagine yourself in his shoes. Then make your presentation from your prospect's point of view.

Step #4: Identify the result your prospect wants. Ask what problem he wants to solve or what goal he wants to achieve. Then ask questions to determine the specific service you can offer. Listen carefully so you know which points your prospect considers most important.

Step #5: Educate your prospect about the seriousness of his problem. The more your prospect understands about the gravity of his dilemma, the more likely he is to hire you to correct it. Use supporting documents and articles as proof. At this point, however, don't offer solutions because your prospect first needs a clear understanding of his problem.

Tell your entire story in words your prospect understands. And don't fall into the trap of hitting only the high points of your presentation. Remember, this information is new to your prospect so explain everything slowly and clearly. You must present information so you cannot be misunderstood because many prospects won't admit they don't understand.

Step #6: Answer common questions before your prospect asks them. If your prospect raises a number of concerns, your discussion could seem adversarial. After you answer the questions, ask for your prospect's agreement to make sure he understood what you said. This way, he won't likely raise the concern again later.

Step #7: Emphasize the reasons your prospect should hire you. Explain how your knowledge, skill, judgment and experience give you special insights that you'll use to bring your prospect the results he wants. Talk about your education and qualifications. Give examples of other people you've helped in similar situations. Give your prospect copies of newspaper articles in which you were the featured expert. Show your prospect testimonial letters that prove how pleased clients are with your services. (Make sure you check your local bar's ethics rules relating to testimonials because some jurisdictions do not allow their use by lawyers.)

Step #8: Check for understanding after each point in your discussion. Watch for red flags that identify something your prospect didn't grasp. Remember, prospects won't buy what they don't understand. Make sure your prospect understands what you tell him.

Step #9: Offer specific solutions and discuss the pros and cons of each. If you offer only one solution, your prospect's choice is either yes or no. But when you present three positive options, he can select from three yes choices before he gets to no.

Step #10: Provide both logical and emotional reasons to hire you. Often, prospects retain your services for emotional reasons, such as whether they like you and whether they feel you truly want to help them. Then they use logic to defend their decision to their spouses and colleagues. When you provide both, you help your prospect justify his decision to engage your services.

Step #11: Quote a fee for each service. Use the contrast principle so your prospect views your fee in the proper perspective. Before quoting your fee, mention a larger number; then by contrast your fee won't seem so high. After you quote your fee, restate one or two major benefits your prospect will gain from hiring you.

For example: "Right now, Mr. Jones, your estate tax liability is over \$200,000. After I set up your asset protection plan, your tax liability will be zero. My fee to draft your plan is just \$7,500. When your plan is in place, it will save your family over \$200,000 in estate taxes, eliminate at least \$25,000 in probate costs and prevent lengthy court proceedings."

Step #12: Recommend a solution from your prospect's point of view. Your prospect is more receptive to your direction when you speak from your prospect's position. Instead of saying "This is what you should do", explain "If I were in your place, I would (take whatever action) because (why)".

Step #13: Invite any remaining questions. Acknowledge each question as a "good point" or "valid concern." Don't view the question as an objection. Your prospect may simply want you to repeat something you discussed earlier. Or he may want more information. Offer your explanation calmly and with confidence. Your prospect wants you to assure him that hiring you is the right decision.

Step #14: Summarize the risks and benefits. Point out to your prospect the risks of allowing the problem to continue (what he may lose) -- and the benefits of solving the problem now (what he will gain).

Step #15: Tell your prospect how much you want to help him. Use collective words like "we" and "let's" to show that you and your prospect are working together.

Step #16: Allow your prospect to make his own decision without pressure from you. If you push your prospect, he will resist. So, instead, remind your prospect that the choice is his -- and that you will gladly answer his questions and provide whatever information he needs to make an informed decision.

If your prospect hires you, reassure him that he has made a wise choice. If your prospect is not ready to proceed, make sure he knows you're ready and willing to help him whenever he thinks the time is right.

Step #17: Follow up with a letter. If your prospect hired your services, thank him and reassure him in writing that he made a wise decision. If your prospect is not yet ready to proceed, encourage prompt action, point out the risks of waiting, and offer to answer any questions, now and in the future.

[Back to Top](#) 