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Intentional Resource Networks Deepen Client Relationships

By Carol Schiro Greenwald, January 10, 2022

Carol Schiro Greenwald asked her panel of attorneys if they intentionally create resource networks as part of their client service approach; and if they do, how they find the right people and how it impacts their client relationships. She shares their insights in this edition of her Business Development column.

As part of their advisory role, lawyers often provide resources for their client in areas far afield from their practice focus. Some lawyers intentionally find professionals such as accountants, bankers, financial advisors, doctors as well as relators, therapists, and designers as vetted resources for their clients. Other lawyers discover people with relevant skillsets as they traverse the networking world. Either way, the goal is to be fully available advisors for their clients. Having a network of people with complementary skills not only enables an individual lawyer to deepen client relationships, it also enhances their entire network. Asking others to help your client provides work for colleagues, creates stronger referral relationships and develops friendships. Resource networks usually include:

- Other service professionals who work with your client,
- People who work with similar kinds of clients,
- Other lawyers in your network who could be useful for your client,
- Other service providers your client might need.

I asked my panelists if they intentionally create these kinds of resource networks as part of their client service approach; and if they do, how they find the right people and how it impacts their client relationships.

Intentional Resources Relationships

Regardless of practice area, most respondents intentionally look to offer their clients assistance dealing with issues outside their practice area.

- Barry Heyman, entertainment attorney, Heyman Law (<https://www.heymanlaw.com/>), says, "I actively seek to make connections with other service providers whom I think my clients may need. I believe it's important to be a resource for guiding my clients and facilitating their needs."
- Crysti D. Farra, Law Office of Crysti D. Farra (<https://www.cdfarra.com/>), a Social Security disability attorney, sees resource networks as "critical to the success of my practice and the well-being of my clients."

- Tracey Daniels, real estate attorney, Daniels and O’Connell PC (<https://danielsoconnellpc.com/>), thinks “it’s important to have quality referrals for clients Individuals buying their first homes often need a sundry of services like trusts and estates planning, an accountant and financial planners.”
- For corporate lawyer Douglas Singer, Singer Law PLLC (<https://singerlawpllc.com/>), “Rather than look to build relationships with contacts having a specific client in mind, we generally approach it the other way. We start by building relationships. Then, when a client expresses a need, we already have the relationship with the potential resource.”

Jodi Warren, partner at Capell Barnett Matalon & Schoenfeld (<https://cbmslaw.com/>), represents not-for-profit and religious organizations. Her firm sees creating resource networks for clients as a key component of their client service. “In nearly every engagement, my goal is to assemble a team of professionals who will work with us on the transactions. These are all individuals who can be helpful to my clients.”

Similarly, Andrew Peskoe, Chairman, Golenbock Eiseman Assor Bell & Peskoe (<https://www.golenbock.com/>), says, “We try to be a trusted resource for a wide range of assistance for all our clients. It can be as personal as helping find the right doctor or as commercial as suggesting a more cooperative and service-oriented lender or an industry-focused investment banker.”

Who Do They Want To Meet?

Some capabilities appear on everyone’s list such as CPAs, CFOs and insurance brokers. Jeffrey Bernstein, Law Offices of Jeffrey N. Bernstein (<http://www.bizlawsolutions.com/>), who serves as outsourced general counsel to closely held businesses, has a typical finance-focused list of resource contacts: “lawyers, bankers, alternative lenders, accountants, bookkeeping services, payroll companies, financial advisors, business and commercial real estate brokers.”

After finding the basic skillsets, lawyers look for clientele-focused specialists. Amy Goldsmith, intellectual property and cybersecurity/data privacy partner at Tarter Krinsky & Drogin (<https://www.tarterkrinsky.com/home>), has an extensive list of specialists to meet the varied needs of her clients. Her list includes:

“Accountants, other financial institutions such as banks or other funding sources, insurance brokers, back office accounting support, firms focusing on mergers and acquisitions, staffing companies, sales experts, branding companies, public relations companies, reputation management firms, prototype developers, social media experts, web developers and graphic designers. For litigation purposes, we work with forensic analysts and e-discovery businesses. Lastly, I have developed a global network of attorneys to assist our clients when they have extraterritorial needs.”

- Elissa Hecker, an intellectual property and entertainment attorney, The Law Office of Elissa D. Hecker (<https://www.eheckeresq.com/>), looks for resources her clients need:

“Accountants, graphic designers, website designers, coaches, Internet security experts, marketing professionals, financial planners, bankers, insurance brokers.”

- Alan Schwartz, Law Offices of Alan J. Schwartz, P.C. (<https://www.ajslaw.com/>), with a practice focused on criminal law looks for “Professionals of all types, such as OASAS [Office of Alcohol & Substance Abuse Services] counselors, psychiatrists, psychologists, private investigators, polygraphists, ballistics experts and accident reconstruction experts.”
- Annamarie Bondi-Stoddard, managing partner, Pegalis Law Group, LLC (<https://pegalislawgroup.com/>), a medical malpractice firm, says, “I personally create connections with people who could be of service to our clients. For instance, we often refer clients to attorneys with expertise in wills and estates, special needs, workers compensation, social security & disability. Also, unfortunately, sometimes clients who are married and have medical issues related to medical negligence cases wind up needing matrimonial attorneys.”

Where Do They Find Resources?

Most connect with resources through networking in mixed membership groups, or with other lawyers at bar association events and CLEs.

- Business Lawyer Sarah Gold, Gold Law Firm (<https://www.goldlawny.com/>), reaches out to “People I’ve actually met and done business with over the years. Also, attorney colleagues I trust.”
- Crysti Farra says, “I am involved in networking groups that provide valuable resources for my clients. More importantly, I am also a board member of a national advocacy organization for my area of law. This allows me to provide the highest service possible to my clients.”
- Nancy Schess, management-side employment law compliance partner at Klein Zelman Rothermel Jacobs & Schess LLP (<https://kleinzelman.com/>), says, “Creating my resource network is part of my regular connecting, sort of like muscle memory. I enjoy meeting new people and listening for synergies. For me, one of the distinct values of networking is the ability to build that resource web.”
- In addition to traditional networking venues, Barry Heyman created his own networking activity. “I co-founded a creative industry networking event called Toasted Almonds, with the purpose of bringing both creatives and industry professionals together to help facilitate connections among my networking base.
- Eric Sarver, an employment and business attorney at Law Offices of Eric Sarver (<https://sarverlaw.com/>), looks for “select networking groups, made up of high caliber professionals with solid work ethics.”

Firms see creating client-focused networks as trust builders and important components of client service. Mark Seitelman, managing partner, Mark E. Seitelman Law Offices P.C. (<https://www.seitelman.com/>), a plaintiff’s personal injury firm, says, “If I do not know of a suitable professional to handle my client’s needs, I have sought recommendations from other professionals who are friends. Sometimes I turn to the Internet or professional societies. One lesson I have learned is that it is better to forgo making a referral to a mediocre professional.”

Others echoed the need to find trusted, accomplished resources. Joel Weiss, managing partner of intellectual property boutique Weiss & Arons (<http://www.weissarons.com/>), says, “We are very selective about the people with whom we associate. When we make a recommendation, or when we join a group, we have to know that our recommendation won’t flop and reflect poorly on our firm. In the legal business, your recommendations and associations reflect directly on you and your firm.”

Some resource networks are very client-specific.

- When Annamarie Bondi-Stoddard meets another skilled professional working with one of her clients “she reaches out to those providers for future reference for other clients and also to let them know who we are and what we do.”
- Joel Weiss regularly meets other professionals who work with the same client. “I don’t create these contacts. They happen as a matter of fact; I don’t need to go out of my way to create such contacts. The foregoing notwithstanding, one of our clients built a cohesive group of all the co-counsel currently working with them. They have become a strong, close-knit group, and the client continues to benefit from the alliance he created.”
- Andrew Peskoe says, “In one key industry, I have a monthly lunch with a large group of service providers and business development executives. That is the exception, but an exception that I would like to replicate.”
- Douglas Singer has built a cadre of professional relationships around estate planning. “With some of these professionals, we have invested time in understanding each other’s process, so that when we bring them in or they bring us in, it is seamless and smooth.”

What Goes Around, Comes Around

Lawyers see developing resource connections as a win-win for both themselves and the client. The client doesn’t have to hire a stranger. They will meet a vetted, knowledgeable, colleague referred by their lawyer who can resolve their problems. For the referring lawyers, it is a win-win because it deepens their referral relationships, often leading to new clients. As Amy Goldsmith says, “Having a team of trusted people able to assist a client is critical to best serve the client. Plus, the network is a built-in referral service.”

My respondents believe their clients appreciate the fact that they are more interested in their success than in milking them for every dollar. Clients looking for specific expertise appreciate firms that take a teamwork approach whether it is totally within one firm or a multi-firm collaboration.

- “Passing a piece of client work to another attorney who does a good job deepens our client relationship.” (Joel Weiss)
- “Our clients appreciate the fact that we consistently work hard to set them up to succeed, not only in a specific transaction but holistically.” (Jodi Warren)
- “Our clients rightly expect a whole client approach. They do notice.” (Andrew Peskoe)

- “Absolutely, clients notice. We discuss our teamwork approach from the outset, so that they can appreciate our whole client focus.” (Alan Schwartz)
- For Nancy Schess, “Creating these external relationships is part of our focus for all of our clients. All of this focus has a solitary goal and result—it helps us create stronger relationships with our clients on both a professional and personal level. It is simply part of how our firm operates.”

Creating resource relationships is an important way for lawyers to add value for their clients. It can be a pleasurable undertaking that encourages the kind of total-client approach today’s clients want.

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