



AIA Best Practices: Retaining clients after the rainmaker leaves

Contributed by Dennis M. Schrag, Ed.D.

Summary

A rainmaker is an employee who maintains strong client relationships that help the firm acquire new business. When a rainmaker leaves a firm, it is vitally important that senior management work diligently to maintain strong client relationships by taking a few proactive trust-building steps.

When business is personal

For professional service firms, trust is the cornerstone of winning work and retaining clients. Thus, strong relationships are the most important factor in keeping existing clients and securing new ones. Even before clients consider how much you or your firm *knows*, they evaluate how much you and your firm *cares* about solving their problems. For most purchasers of professional services, trust begins with a key person who really cares about the client's problem and can be trusted to develop and implement a solution. This individual develops a relationship with a prospective client or nurtures a relationship with an existing one. He or she transforms the prospective client into an actual client and sustains the professional relationship that leads to more work. Such person-to-person business relationships sometimes dissolve when a key employee with established client relationships—a rainmaker—leaves a firm.

To gain insight into how the departure of a rainmaker affects companies, the Society for Marketing Professional Services (SMPS) funded a study through the SMPS Foundation. The study focused on three questions:

- What do firms do to successfully retain clients when a rainmaker leaves with advance notice?
- What do firms do to successfully retain clients when a rainmaker leaves without notice or with very short notice?
- Is there a difference in successful client retention when the rainmaker is a “doer/seller” (project manager or managing partner) versus a full-time seller (marketing professional or partner in charge of marketing)?

The study produced interesting and somewhat unexpected results. For example, advance notice does not seem to affect client retention; the efforts of successful firms to retain clients have largely the same results regardless of how much notice a rainmaker gives before departing. Whether the rainmaker was a doer/seller or a full-time seller did not appear to make any difference in successful client retention either.

Not surprisingly, perhaps, the most important factor was a firm's response to the departure. Firms that retain clients respond quickly, and their responses share the following characteristics:

- Immediate contact by a senior executive of the firm
- Personal, honest communication with the client by a senior firm executive who explains the departure (or planned departure) of the rainmaker
- Face-to-face meetings whenever possible
- Quick identification and introduction of the rainmaker replacement (by the departing rainmaker, if appropriate)
- Enhanced frequent communication with the client by phone, e-mail, and face-to-face meeting during the early stages of the transition by the firm's executives and the rainmaker replacement.

Rebuilding trust

The evidence is clear that firms need not lose clients when a key employee leaves. Cementing a relationship during times of transition can be time-consuming but far less so than the marketing effort required to secure a new client.

Some rules of thumb to keep in mind when a key employee plans to leave your firm:

Act with urgency. Communicate with your clients as soon as possible. Let them know a transition is in progress. Gain the home-court advantage by having clients learn of the transition from senior management rather than from the departing rainmaker or rumors on the street. Remember that word of mouth can work *for* you or *against* you—few communication systems are faster.

Send in the big guns. Senior-level management or principals must actively communicate with clients. Until a new relationship of personal trust is established between the client and the rainmaker's replacement, the participation of senior management is essential.

Keep it personal. Keep the message positive, simple, and personal: "Henry was a fine fellow. You will enjoy working with your new client service manager, Rachel. Our firm will provide seamless service as usual. I personally want to make this transition successful. Please call me any time."

Transition quickly. Identify a replacement rainmaker as soon as possible. Senior-level management should introduce the new rainmaker when it is not possible or appropriate for the departing rainmaker to do so. Many firms build redundancy into the relationship, with two or more people from the firm knowing the client.

Resell and recommit. Review with your client why your firm was selected, and reiterate those features and benefits to the client organization. Communicate this message several times.

Nurture the relationship. Nurture the new client-rainmaker relationship with frequent communication.

Be honest. Be honest with clients, your firm, and yourself. Your competition will be intense during this transition. Established professional friendships are powerful. It will take time and energy to keep your client.

Manage client relationships consistently. Develop and implement a database to facilitate consistent client relationship management. Readily available information and a clear understanding of the client's organization, needs, and operations will allow for better, faster, and more successful client relationship transitions.

About the contributor

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