

Business Development with Legal Checkups

By: Michael L. Goldblatt

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70 years ago, lawyer Louis Brown advocated for client checkups in his Manual on Preventive Law. Until his death in 1996 at the age of 86, Brown continued to write and lecture about the benefits of checkups and preventive law. He also originated the ABA's Annual Client Counseling Competition, established the National Center for Preventive Law, and funded an Annual Preventive Law Prize Award. Periodic legal checkups can be rewarding to lawyers and their clients. This article provides tips and resources for conducting checkups for individuals, businesses, and non-profit organizations.

Benefits. Legal checkups alert clients to opportunities for avoiding problems with a lawyer's help. Legal specialties well suited to checkups include corporate, estate, employment, family, and real estate practices. Checkups are especially important for individuals caring for aging family members, changing family status, or starting up businesses. Checkups can detect the need for documents like a power of attorney, premarital contract, or partnership agreement.

Questionnaires. Start by drafting a checkup questionnaire that clients can complete online or on paper. Ask questions that elicit responses to identify legal problems. Give questionnaires to clients in advance of an office visit or during a consultation. See the Resource paragraph below for links to samples.

Marketing. Prepare written or audio materials to make clients and referral networks aware of your checkup services. Distribute the materials in a variety of ways, including:

- Add checkups to the services listed on your firm's blog, brochure, and website
- Conduct a seminar or webcast about the benefits of checkups
- Mention checkups during your speeches
- Record a podcast about checkups and upload at iTunes or YouTube
- Send a letter to clients inviting them to your office for a checkup
- Submit an article about checkups to your local newspaper or business magazine
- Write a checkup pamphlet and display it in your firm's reception area

Tracking. Develop a system for retaining responses to checkup questionnaires. Follow-up with clients about the need for legal services identified by questionnaires. Track results to show clients the value of annual checkups.

Billing. Consider providing free or reduced cost checkups to attract clients to your firm. Use checkups to make clients aware of services you can provide to help them achieve their goals.

Resources - For inspiration, read Brown's classic [book on preventive law](#) and contemporary articles about the benefits of [legal checkups](#) and [annual reviews](#). View sample checkup questionnaires at MostenMediation.com, PracticePro.ca, Slideshare.net and USLegalForms.com. See examples of how to market checkups at the [Freeman](#) and [Argent](#) firm websites. Learn how to conduct checkups by reading [articles](#) and visiting the preventive portals created by the [Canadian Bar Association](#) and the [American Federation of Government Workers](#).

Conclusion. Louis Brown raised the legal profession's awareness of checkups through his writing and teaching. Checkups are a win-win --- they are good for your client's legal health and for your firm's business development. Make checkups a part of your practice and start alerting clients to legal needs that might otherwise go unserved.

About the Author

Mr. Goldblatt has authored numerous books and articles about marketing for lawyers.