

The Silent Exit

Most firms lose the relationship right when they've earned the right to keep it. The matter's done, the client's happy — and then nothing. No thank-you, no ask, no next contact. This checklist covers what to do in the window most firms let go quiet.

Why Formal Close-Outs Matter: Stop Letting Warm Relationships Go Cold

Every law firm loses clients it never had to lose — not through bad work, but through silence. The matter closes, the invoice goes out, and the relationship just stops. No thank-you, no follow-up, no ask. It feels like nothing happened.

But something did: the client's default state is now loyalty to no one. In your comfort zone, it's easy to assume you've built a client for life. In reality, they can't even remember your name eight months later.

A formal close-out process fixes this by design, not memory. It turns "we should stay in touch" into a firm date on a calendar. It turns "good clients refer people" into a direct request made while the relationship is warmest — not months later, when the moment has passed and it feels awkward to reach out.

Proof it works at scale: Joe Girard — Guinness World Record holder for most cars sold by one person — sent every client the same simple card every month for over a decade. No pitch, just "I like you." Consistency, not cleverness, is what kept him top of mind and helped build an amazing local referral base.

None of this requires more hours. It just requires doing the same few steps, the same way, for every single client — whether the principal remembers to or not. That's the difference between a firm that systematically grows on referrals and one that just hopes for them.

1 The Day the Matter Closes

Do these before the file gets archived — not "when there's time."

- ☐ **Send a proper close-out message within 24 hours.** Not a system-generated notice — a short note from a real person confirming the matter is finished.
- ☐ **Confirm final costs and any trust balance or refund in writing.** The last financial touchpoint should feel as clean as the first.
- ☐ **Say thank you — specifically.** Reference something real about their matter. A form letter reads like a form letter.

2 Before They Leave Your Orbit

This is the warmest the relationship will ever be. Use it.

- ☐ **Ask if there's anyone else who might need this kind of help.** Not "let us know if you hear of anyone" — an actual, direct ask.
- ☐ **Tell them how long you'll hold their file and how to request a copy.** Say it upfront. Don't make them chase it in six years.
- ☐ **Set a genuine next-contact date.** Not "keep in touch" — an actual date, six or twelve months out, that goes in a calendar.

3 The Follow-Up System

What happens after everyone's moved on to the next file.

- ☐ **Add them to a real check-in list — not a mailing list.** Six-month or twelve-month, matched to the kind of matter it was.
- ☐ **Send something useful at that check-in, not a sales pitch.** A relevant update, a heads-up, a genuine "thinking of you" — earn the next conversation.
- ☐ **Record who referred them in, and who they've referred out.** If nobody's tracking this, you can't tell if your best clients are actually your best source of new ones.

If this checklist is harder to tick off than it should be —

that's usually a sign the close-out step was never actually built into how the firm runs, not a discipline problem. That's exactly what businessforlawyers.com.au helps fix. Get in touch: roy@businessforlawyers.com.au