How to Revamp Your Client Service System in 24 Hours or Less

One of the easiest ways to continue the momentum after successfully engaging a client is to thoroughly automate the client service process.

This not only ensures you are continuing the WOW experience after your initial meeting but it also helps the client to justify…and feel really good about the investment they just made into your firm.

This process will also make a HUGE difference in how your clients talk about you to their friends, family, clients and colleagues, which will result in far more referrals for you in the long run.

So by now you should already have (or at least be researching) a practice management system to help you keep track of your new clients and the action steps that must be completed on their behalf.

However, you don't necessarily need a practice management system to get started with this. You can revamp your entire client service system in less than 24 hours by merely setting up an excel spreadsheet that lays out what needs to happen (and more importantly WHEN it needs to happen) after a prospect becomes a paying client of your firm.

And ideally, you'll want to sit down with your team when you do this (starting from the minute the client leaves your office after successful engagement to the completion of the work they've paid you for) so everyone is on the same page and knows what's expected of them.

To give you an example of what I mean, here are some of the action steps that happened in my own law firm after a client said yes to working with us:

1. Immediately set time and date for their next appointment at the meeting.

2. Personal phone call within 2 days from attorney checking in and thanking client for choosing the firm.

3. Series of 4 follow up emails sent over two week period welcoming client to our firm and introducing them to the team and process they'd be experiencing so they knew what to expect.

And the list goes on….in fact, I had a 14-step follow up process documented out and automated once someone became a client.

This follow up process turned my clients into raving fans because it was so different than anything other lawyers were doing. And, it eliminated that feeling that most clients have after they engage a lawyer of falling into a big, black hole.

Plus, it saved us time because we eliminated 99% of those time-sucking "just checking in to see what progress you've made on my file" phone calls because the client now **knows** what you are working on and where they are in your process.

The key to making this work in your firm is automation. If it's left to a human to make this happen, it won't. At least, not consistently. Automate your client service process and watch the magic happen.