Legal Vertical Strategies

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Lessons from the Trenches: Client Service Teams

What law firms of any size can learn from formal client development efforts

By Debra Baker, Esq.

Formalized Law Firm Client Service Teams are typically the province of "Big Law," but the fundamentals that go into building a successful client team apply to law practices of any size.

Client Service Teams – a fancy name for strategic account management – offer firms a way to improve existing client relationships, institutionalize best practices for client development, and instill a culture of business development among attorneys.

At large firms, Client Service Teams are typically made up of an interdisciplinary group of lawyers who work together to analyze the client and develop a detailed action plan to solidify the relationship, expand the work they do for the client and improve the overall delivery of legal services.

While these efforts take time and resources, the long-term benefits far outweigh the costs.

Here are five lessons learned from client service teams that apply to any law firm.

Lesson 1: Listen to your clients

Soliciting client feedback is one of the easiest ways to improve client relationships. But it is often an effort that is glossed over as unnecessary.

Client feedback does not need to be a complicated affair.

Three simple questions provide a wealth of information:

1. Were you satisfied with the representation you received?
2. What did we do well?
3. What can we do better in the future?

If the feedback is positive, you can add a fourth question: Would you be willing to refer me new business?

If you aren't sure you are getting the answers you want, consider having a third-party collect feedback for you. Client Feedback Interviews are the single most valuable investment you can make in marketing and business development.

Lesson 2: Understand your clients

Understanding the trends, drivers and needs that impact client behavior is the first step in moving from being a service provider to a trusted advisor.

If you work with businesses, analyze the industry trends, business strategies and goals of your clients.

If you work with individuals, look at the demographics of the clients with whom you work. Consider the issues and challenges they face and the impact those factors may have on their legal needs.

Your client will benefit from having a legal resource that can assess a problem from a business standpoint. As a trusted confidant, you position yourself for more business.

Lesson 3: Business Process Matters

The competition for legal services has never been greater. Providing consistently excellent legal services is no longer a way to standout. It is a baseline requirement.

How you work is the key to demonstrating added value to clients.

Creating formal business processes sets the foundation for two client service essentials: communication and value-based billing.

Look at the legal work you do and create a business process that details each step of the process. Document it. Explain it to your clients. Provide them with timelines for deliverables and updates. This way you can manage expectations, avoid miscommunication and focus on the legal work at hand.

Once business processes are in place, it becomes much easier to analyze pricing structures and provide clients with alternatives beyond the billable hour. Value-based billing relieves you of the pressure to bill and it provides clients with more confidence and pricing predictability.

Lesson 4: Appearances Count

Relationship management touches every aspect of the business—from how you answer the phone to how you bill your clients. Create a client service policy for your firm and make sure every person on staff understands their role in relationship management.

Appearances go beyond courtesy alone. They include our online presence. A professional website is not an option. It is essential for both awareness and credibility. If a prospective client can't find you on the web, they may question your legitimacy. Something as simple as using Gmail rather than a business account when emailing can have a significant impact on how clients perceive you.

Lesson 5: Communication, Communication, Communication

Communication starts with a clear explanation of the work you will do. It continues throughout the engagement and beyond.

Learn how your client likes to communicate and communicate that way. Some people are most responsive by phone, others by email, text or instant message. Instead of forcing your clients to adapt to your communication style, try adapting your style to theirs. By doing so, you will be recognized as being more responsive.

Maintain consistent, ongoing communication with your client during and after the engagement. This can be as simple as a quarterly check-in to see how they are doing or a sophisticated marketing program. Regardless, maintaining awareness with clients is the key to future business and great referrals.

Client service is an essential component to any law firm business plan. These simple lessons can provide the foundation for long-term client development.

Debra Baker, Esq., is a principal with Legal Vertical Strategies and chairs the Law Firm Services Group. Throughout the course of her career she has worked with more than 50 client service teams for AmLaw 200 firms. Her blog, Law Firm Transitions (www.lawfirmtransitions.com), focuses on strategies for improving the way law firms deliver value to clients. She can be reached at dbaker@lvstrategies.com.