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CLIENT SERVICE: MAKE IT A PROGRAM, NOT JUST A BUZZWORD

In today's extremely competitive legal market, many firms talk about the importance of cross-selling – or cross-marketing if you prefer – their clients. The problem is that you must serve the client before you can cross-market the client. Too many firms fail to realize this. As a result, their cross-marketing efforts often fail. The first step in developing additional business with clients is client service.

Here's a brief list of some of the more important points to keep in mind in developing and implementing a successful client service program.

- **The goal should be outstanding client service.** "Satisfactory" or "good" isn't good enough. Many clients can't evaluate the quality of legal work. Therefore, the level and quality of service is often the only factor that distinguishes one firm from another.

- **Client service begins with the intake.** Listen to the prospective client. Make them define their expectations, then match those expectations with reality. Discuss how the fee will be structured – hourly, flat fee or some alternative fee arrangement (AFA). Discuss costs and billing procedures. Introduce the client to your secretary/assistant and also to any other timekeepers who may work on the matter.

- **Keep the client informed.** There's an old adage for lawyers, "Shower the client with paper". Today that would be expanded to include e mail, extranet or other forms of communication. Send or transmit copies of correspondence, briefs, other documents. Discuss strategy with the client. Tell the client what they must do and what information they must provide. They won't know unless you tell them. And don't wait until the last minute. Remember that people often need time to act or to make a decision on something.

- **Anticipate the client's needs and questions.** Tell them what will happen. Also advise them what might happen. Clients don't like surprises.

- **Meet court-imposed deadlines. Beat client imposed ones.**

- **Be responsive.** Return phone calls and answer e mails and letters promptly.

- **Be courteous – and patient.** Clients sometimes ask questions the lawyer thinks are dumb or ask the same question repeatedly. When that happens, take a deep breath and answer.

- **Use a team approach.** Half the time when a client calls, they don't need to talk to you. They just want some information or have a question. Frequently your secretary/assistant, a paralegal or another lawyer working on the matter can help them. But to make this work, you have to train and trust your "team" – which is why you should introduce them to the client at the intake. Keep your secretary/assistant informed of what's happening. When clients call and ask for you, encourage her to ask if she can help them – particularly if you can't take the call then or are out of the office. If the clients get the answer or information they're looking for, it satisfies them. It also saves you time.

- **Bill regularly.** Clients much prefer that. It helps them plan their cash flow. Regardless of how the fee is structured, most clients also prefer descriptive bills so they can see what has been done for them. Send a cover letter or, if billing electronically, an e mail with every bill. If you haven't talked to the client recently, give a status report. A wise and very successful lawyer once said to me, "Bill promptly, while the glow of appreciation still shines in the client's eyes."

- **Startling idea.** Go visit the client, particularly when you don't have to!

- **Learn everything you can about the client's business or profession.** Also, if the client is a company or organization, get to know other key people and keep abreast of any changes.

- **Let the client know when you send the final bill.** In addition to stating that in the cover letter or transmittal e mail, also state it on the bill. Remember what Peggy Lee sang many years ago: "That's all there is." Also thank the client for selecting you.

- **Ask for feedback** during the matter or definitely at the conclusion. Many of your clients won't tell you when they have a complaint unless you ask them but they'll frequently tell others – and sometimes even your competition. Also ask how you can serve them better.

- **Follow up or keep in touch.** Put the client in your data base or on your mailing list if you haven't already done so – which you should have done at the intake. Contact the client occasionally to find out how they are doing.

There's nothing brilliant about this list and it is by no means complete. But it's a starter. If you and your firm are going to provide Outstanding Client Service, it must be a top priority program, not just a buzzword. Yes, it takes time and effort. But, considering the alternatives – clients you can't cross-market or, even worse, lost clients – it's worth it.

Robert Denney Associates Inc. has provided strategic management and marketing counsel to law firms, companies and non-profit organizations throughout the United States and parts of Canada for over 30 years.

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