

Client Experience

How to create a successful strategy to set your firm apart from the competition.

BY DEBORAH ROTH GRABEIN

The best thing that a small firm can do is to focus on client experience. What does the brand say about the firm? What is the culture of the firm? What kind of service should a client expect? What information about the firm is online and on social media? What do other clients and referral sources have to say about the firm and its lawyers?

Start with defining what type of experience you want your clients to have. If the client were writing a review of his or her experience with you and your firm, what would you want it to say? What would make you cringe to see online? What is the optimum experience a client could have with you, in addition to a winning result? What can you do to help define and manage the client's experience? There are several things any firm can do to help differentiate itself in this competitive legal market.

Client Advisory Panels

Lawyers in smaller firms have opportunities to develop and strengthen client relationships a bit differently than in larger firms. The issue of who makes key decisions about the client relationship is easier than in larger firms. This affords small firm lawyers opportunities to spend time with their clients in different ways. For example, creating a client advisory panel gives both the lawyers and clients a forum to meet and discuss relevant matters including everything from best practices for client services to current legal issues. A client advisory board can provide smaller firms the opportunity to introduce new ideas such as technology capabilities, fee structures, and client service enhancements and gives clients a forum to share input and feedback.

In addition, bringing clients together for a discussion provides a way for clients in different industries and businesses to get together. Not only do clients want you to help them solve their legal needs, but they want you to make introductions to others who can help them with other aspects of their businesses and who can be a referral source.

Tip: Share the information gathered from these advisory panel discussions with your clients and prospects. You could create

a video, newsletter, or blog post about best practices that benefits all of your clients. Be respectful of anything that is shared confidentially and be sure to get any necessary approvals from clients for quotes that you may want to share. This is a great way to follow up from the discussion as well as to share best practices.

Client Teams

Creating client teams can be easier in a smaller firm as well. The purpose of the client team is to be intentional about taking care of the client. It's not just about legal outcomes but also about ensuring everyone who works with that client knows the client's business, industry, and staff and provides for sharing pertinent information so everyone is on the same page. Lawyers should include secretaries, legal assistants, and others in the firm who work with the client on the team.

Consider ways for your team to engage with your client outside of the office. For example, several teams have joined clients in community service projects—for example, Habitat for Humanity. Teams wore T-shirts while they worked on the project that featured the logos of both the client and the law firm. The teams from the client and firm got to know one another outside of the office and they were able to work together to achieve a common goal. And, you can learn a lot when teamwork is involved.

Tip: Planning is a good first step when creating a client team. As Stephen Covey suggests, "Begin with the end in mind." What are the goals for the team? How will you define success? How will your client define success?

Client Feedback

In a smaller firm, opportunities exist to develop a client feedback program that can help a firm stand out. While on the rise, the number of law firms that routinely conduct client interviews is small compared to the number of firms across the country. Unless you programmatically implement a process by gathering and responding to the feedback, you stand to lose clients. Most clients won't tell you if something went

wrong or that they had a bad experience. They just won't come back. Small firms could select two or three clients and implement such a program. Based on that feedback, the firms could then make improvements (if indicated) across the board for all clients.

Tip: Resources are available on the topic of client feedback, including companies that can conduct interviews on behalf of the firm. Consider what is best for your firm and clients. If nothing else, attend a seminar on this topic to understand how it works and how it could apply to your practice and firm.

What's Next?

By now you are probably reeling from the thought of implementing any of these initiatives. After all, your firm is smaller, your resources limited, and—like every other lawyer regardless of firm size—you have legal work to complete for your client. And those demands are significant. So what can you do? Pick one thing and start. As you decide which of these you want to implement, consider the following:

- What could be successful in your firm? Why?
- How could it work for your practice, your culture, and your clients?
- How could you successfully support it? What resources could help?
- What resources could you hire to assist?
- What could you realistically achieve?
- What if you set a stretch goal? What would it be?
- How will you measure the results?

Tip: As you consider what to do, talk with colleagues and others who have implemented any of these in their firms. Talk to consultants and marketing professionals who have also used these programs and most importantly, talk to your clients. Ask them two questions: "What do we do that you like?" and "What do you wish we would do differently?" The answers to those questions will help you determine what you need to do to create a program to ensure your clients have a good experience with your firm. **TBJ**

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