

Six Steps to Service Excellence

By Sally J. Schmidt

Reprinted with permission from the *Sally Schmidt Report*. Sally J. Schmidt is a marketing consultant to dozens of law firms in the United States and Canada.

I spent the majority of my billable time last summer on client relations projects. I have interviewed dozens of individuals on behalf of law firm clients and have conducted 11 programs on client relations issues for attorneys and support staff.

I view this increased attention to client satisfaction and service as a positive sign; law firms are becoming more attuned to the need to retain and gather feedback from clients. Unfortunately, each time I personally talk to users of legal services — and I have now talked to hundreds — I am constantly reminded how far we have to go.

One lawyer for a major financial institution provided a particularly succinct view of what lawyers serving corporate clients must do to be more service-oriented. I have organized some of his comments around six major axioms which I believe law firms must embrace and incorporate into their cultures in order to be successful in the future.

1. Client Service is Quality

"Quality is the caliber of the lawyers. It's the manner in which they handle legal affairs. It's service. It's the delivery of documents, producing the documents. It's what goes in the billings."

Quality is espoused by every self-respecting law firm. Many lawyers feel it is the thing that truly distinguishes them from their competitors and it may very well be. But the lawyers' definitions of quality often do not match clients' perceptions.

What do clients use to evaluate quality? Each client is different, of course, but the fact is that everything tangible or visual produced by the law firm — invoices, communications, legal documents, functions, office decor — as well as the behavior of its people — returning phone calls, delivering documents, participating in community activities — will be used by clients to evaluate quality. Defining quality through work product only — a well-written brief or a brilliant trial strategy, for example, is simplistic and shortsighted.

2. Client Service is Responsiveness

"If I had one thing to put on every lawyer's desk, it would say: 'Respond.'"

Perhaps more than any other service characteristic, responsiveness is of utmost importance to clients.

Many satisfied clients, when asked about the responsiveness of their attorney, will point to the lawyer's efforts to be accessible — attorneys who call from home at night or who freely give out their car and home telephone numbers. They also talk about the lawyer's ability to get the work done as agreed, meaning on time, and in the form or format expected. Finally, they talk about the lawyer's efforts to deal with client concerns or issues quickly and in a forthright manner, such as making corrections to invoices over disputed fees or calling back on the status of a delinquent project.

3. Client Service is Loyalty and Sensitivity

"Law firms need to realize that they can't possibly pass back every cost to clients. I'm not going to pay for them."

With the recent changes in corporate client relationships, one might be led to believe that clients

are not very loyal anymore. They are shopping around, often using several firms at the same time.

I believe this is a key issue. Satisfied clients will feel a stake in their relationship with their law firm. They will be very loyal to the firm, as long as that loyalty is returned. What does that mean for lawyers?

It means that if the firm's workload is down, it reduces its billable hour expectations without negatively affecting the lawyers' performance reviews. In this recession, many large and stable clients have seen their legal bills go up because unproductive attorneys needed a place to hide some time. The firm's best clients should not have to pay for the firm's sagging business.

It means being sensitive to client economic considerations. This could take the form of extending payment options for good clients in bad times — making an investment, so to speak, in the future health of the client. It could also mean looking carefully at firm renovations or relocations, making certain that the new digs don't offend clients in distressed markets or that the move does not correlate in clients' minds with recent increases in billing rates.

Loyalty could mean communicating to clients what steps the firm is taking to become more cost-effective in the provision of its services, such as introducing new technology or increasing the use of paralegals. It could mean not punching the time clock every time a client calls.

Loyalty means being sensitive to conflicts. Again, the client's view of a conflict of interest may not be the same as the lawyer's and good clients deserve to be heard on this issue.

Finally, it means that many things must simply be seen as the cost of doing business. Clients understand paying for delivery charges if they requested that a document arrive at a certain time; they do not want to pay for

delivery charges because the lawyer waited until the eleventh hour to do the work. Clients understand paying long distance charges for faxes sent on their behalf; they do not want you to turn your fax and copy facilities into profit centers.

4. Client Service is the Responsibility of the Firm

"If I had a firm, I would bring in people outside the legal profession to train the attorneys in responsiveness. I would invest in a really good human resources person to put together the elements — hiring, training, caring for people. If corporations are doing it, there's got to be a reason."

The firm needs to put in place systems which promote and enhance excellent service. This includes recruiting people who are bright, capable and service-oriented. It requires reinforcement of this service orientation through training, compensation, recognition and promotion to partnership. Finally, it means recognizing that everyone in the firm has a role to play in providing good client service.

5. Client Service is the Responsibility of the Individual

"They're only as good as the individual I deal with. One bad apple can ruin the bunch."

Providing excellent client service must be an individual philosophy. Law firms can perpetuate this in-

stitutionally, through mission statements, careful recruiting, compensation systems, training and the like, but in the final analysis it is incumbent on the individual — attorney, paralegal, secretary or other firm representative — to do everything in his or her power to ensure a satisfied client.

6. Client Service is a Lot of Little Things Done Right

"This is not a legal business; it's a service business. If you're not capable of providing service, get out of the business. You can hire smart people anywhere. After that, service makes the difference."

Sally J. Schmidt, Sally Schmidt Consulting, Inc., 1601 East Highway 13, Ste 106, Burnsville, MN 55337. 612/895-5797

Helpful Tips

In the November 1991 issue of *Communication Briefings* newsletter, the editors highlighted some of the most useful tips they have published. Here are a few.

- Ask all employees to answer this question periodically: "If this were my money instead of the organization's, would I spend it this way?" The question can be applied to such things as expense accounts, extra colors in publications and new equipment.
- Pretend that your next memo must be sent as a telegram that you have to pay for. Chances are, the less the telegram costs, the more effective your memo will be.
- Don't fax anything confidential unless someone has asked you to. You may unwittingly

provide information that others shouldn't see.

- Sit directly across from the person with the most power at a meeting. Dialogue seems to be fullest between people who sit opposite each other, *Successful Meetings* magazine notes.
- Check those first impressions today. Do visitors have access to nearby parking? Are signs easy-to-read and directions simple-to-follow? Are bulletin boards and notices up-to-date? Are magazines in the reception area current? Assign someone to evaluate all first-impression items periodically.
- When giving a new employee a job description, ask the newcomer to rewrite and update the job description after two weeks. *Reason:* You'll find out quickly if the person has a grasp of the job.
- If two people are proofreading something, have them start at

opposite ends of the material. Usually people get tired toward the end of the reading and miss errors.

- When employees fail to do their jobs, either they're not capable or not motivated. To find out which, consider this question from Andrew Grove in *High Output Management*: If the person's life depended on doing the work, could he or she do it? If the answer is yes, that person is not motivated. If the answer is no, the employee is not capable.
- Here's a good way to determine if your letters are considerate of the reader's point of view: Count the number of "you's" and the number of "I's" and "we's." If the "you's" are outnumbered, make the necessary changes.

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