

MARKETING

New Ideas for Keeping Clients Happy

By Sally J. Schmidt

You already know that client satisfaction is the key to your success. Here are some *new* suggestions on keeping clients happy:

✓ Invite clients to your next firm retreat.

Invite a few key clients to attend part of your retreat. Ask them to discuss their relationship with the firm and how it can be improved. Get their predictions for the future in terms of the legal services they'll require, whether they want alternative fee arrangements, etc.

Bounce ideas off them so you can benefit from their perspective; for example, if you're considering a new marketing campaign, ask their opinion. Get their reaction to new technology you're considering, such as a voice mail system. Law firms often make expensive changes without even asking clients what they think.

The clients shouldn't be present for the whole retreat; they might come in the late afternoon and stay for dinner, for example. And don't invite too many; you don't want your firm retreat to turn into a client-entertainment function.

✓ Circulate a list of your top clients to all attorneys and staff.

It's very helpful for everyone at your firm to know who your best clients are, so they can respond appropriately to phone calls, etc. When those clients walk in the door, the receptionist should know they're not an opposing lawyer or a salesperson and should greet them accordingly.

One person recently told me that he called his longstanding law firm, only to be told that a particular lawyer was at lunch. The person then asked for other lawyers and was told that each was busy. The person finally said, "But I need to talk to a lawyer." The response? The receptionist referred him to the bar



Promote your clients' products. Post a notice on your firm bulletin board: 'If you're thinking about buying a new car, go see our client John Jones at Jones Motors.'

association's lawyer referral service.

If an important client calls and you're on the phone, your receptionist should know to run down the hall and let you know that the call is important.

✓ Make it easy for clients to contact you.

Create a pocket phone directory for clients with the e-mail addresses, home and car phone numbers and direct dial numbers of each lawyer and staffer.

✓ Contact former clients just to chat.

For legal matters that have a definite conclusion (e.g., a real estate closing or a trial), develop a tickler system to remind lawyers to contact the client three or six months after the final bill is paid.

There is no better way to create good will than to call a former client and ask, "How are things going?" when there is no specific reason for your call.

✓ Let clients design their own invoices.

With new billing software, it's easy for a firm to put as much or as little detail as desired into an invoice. Why not let individual clients make that decision?

Prepare a binder with different choices for invoices. Some clients may want enormous detail, listing every phone call you make. Another client may

simply want an invoice that states: "For Services Rendered, \$1,000." Give clients the choice.

✓ Tour clients' facilities.

Ask clients to set up a tour of their facilities for people in your firm who regularly work for them, including partners, associates, paralegals and secretaries. Tour the plant or building, and arrange a meeting to introduce everyone face to face and discuss ways to make the relationship go smoothly.

Everyone likes to show off what they do. Clients will feel that the firm is genuinely interested in them rather than regarding them only as a legal problem to be solved.

✓ Promote your clients.

Invite them to speak at firm seminars or write articles for your firm newsletter. For example, they could write about what's going on in the health care industry from the client's perspective, or about a new procedure or policy they've implemented at their company.

Promote their products and services. You can send around a memo or simply post a notice on your firm bulletin board: "If you're thinking about buying a new car, go see our client John Jones at Jones Motors." You may even want to publish a directory of clients and the services they provide and prod-

ucts they sell, so your staff can do business there.

✓ Host 'client recognition' events.

Good clients deserve to be recognized and rewarded for their loyalty and business. Plan an annual event with each of the firm's most significant clients, tailoring the function to their interests, personnel, etc. For example, you may want to celebrate the anniversary of a new headquarters building or the date the company was founded. A less expensive option is to send flowers or a recognition plaque. It doesn't really matter what you do, it's the fact that you made the effort.

✓ Call yourself up.

Without identifying yourself, call your firm to determine how long it takes until the call is answered, how friendly and helpful your personnel are, and whether voice mail greetings are up to date. Use what you learn for improving service or for redesigning your telephone system.

✓ Create a pamphlet of 'Frequently Asked Questions' for your staff.

The pamphlet should have a list of typical questions from clients and how to answer them. It should also include basic information about the firm including the practice areas you handle, which lawyer the staff should turn to for help with firm-related questions, etc.

I've heard from too many people that they've called a firm seeking a bankruptcy lawyer, for example, only to be told that the firm doesn't do that kind of work — when, in fact, it does. That's an easy way to lose clients.

Everyone talks about the importance of keeping clients happy. What is your firm doing about it? **LWUSA**

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