Play to Win

The Client Relationship Meeting

By Sally J. Schmidt | Feb.23.17 | Business Development, Daily Dispatch, Legal Marketing, Play to Win

Lawyers have a lot of communication with their clients. But the vast majority of interaction tends to be related to specific matters — requesting some information, reporting on the status of a file, scheduling something, checking on a payment. There may be the occasional dinner or hockey game, but typically there isn't much discussion about the client relationship itself.

Many law firms are implementing client feedback programs, of course, and no firm should be without one. But that doesn't absolve individual lawyers of the responsibility to have their own relationship-related discussions with clients.

The Relationship Meeting Agenda

One of the simplest and most effective activities you can undertake in your practice is a relationship meeting with a good, ongoing client. While the goal of the meeting is to identify levels of satisfaction, best practices and areas for improvement, it can often lead to opportunities.

Early in a new year is a great time to reach out to clients for this valuable activity. It logically allows for both a look back and a look forward. Here is a sample of what a meeting agenda might include.

1. You can start with a look at the work done over the past year.

- **Review of matters:** Depending on the volume of work you are doing for a client, you can review the matters one at a time or in the aggregate (e.g., the number of suits you handled).
- **Highlights of results:** Determine ways you can present the good results you obtained for the client. For example, you could focus on the time it took you to resolve or dispose of matters, how the fees aligned with the original budgets or a few of the best results the firm obtained.
- **Value-added activities:** Highlight any extras the client may have received, such as free training or a secondment.

2. Then both parties should discuss recommended adjustments or actions.

- **Best practices and areas for improvement:** Start with a two-way discussion of what went well and what could have been done better. How did the client feel about how things went? How does the firm evaluate the client's role in the process?
- **Specific changes or actions that would be helpful:** Both sides should discuss specific ways the relationship can be improved going forward, including things like case assignment procedures, staffing, client involvement, communications, status reporting, value adds, billing and so on.

3. Finally, the discussion can turn to the new year.

- **Challenges:** Ask what the client's top challenges or imperatives are for the year. What are the most important initiatives? How will the client define success? On what basis will the client contacts be measured?
- **Opportunities:** Based on that discussion, explore how you can help, either institutionally or personally.

Make It Personal

Keep in mind that the frequency, format and agenda for a meeting like this should be customized to the client. For example, if your client is the owner of a closely held business, it might make sense to meet monthly. If it's a large client for which you handle the trademark portfolio, an annual meeting may be the best option. However you do it, a client relationship meeting will be a wonderful addition to your client protocols.

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