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# Key Take Aways:
# Client Relations – Your Front Line Role Webinar
## Speakers: Sally Schmidt and Sally Field
## June 1, 2010

### Five factors that clients use to evaluate a firm

1. Reliability
2. Responsiveness
3. Assurance
4. Empathy
5. Tangibles

### The statistics

- Existing clients are the source of 80% of future business
- On average it costs five times as much to get a new client than it does to keep an existing client
- If a client is not satisfied they typically tell 10-17 other people and not always the firm
- According to a 2006 survey by Inside Counsel Magazine, 52% of law firms gave themselves an "A" rating on client service, while 32% of their clients gave them an "A" on client service

### Intake and Onboarding

- Learn as much as you can about the client
- Understand what is important to your client
- Introduce the client to multiple firm contacts
- Make visitors feel at home – say "hello," offer coffee, show them around
- Don't leave clients sitting in the lobby, if the lawyer isn't available escort them to a conference room, if possible

### Five keys to satisfied clients

1. Communications
    - Make sure someone answers the phone (most clients expect an answer within two rings)
    - When answering the phone get all of the stress out of your voice first
    - Clients typically expect their calls to be returned within half a day if they leave a message
    - Don't just transfer to the lawyer's voicemail, ask first "Can I help?"
    - Be a good listener – Ask questions, clear everything but the client's file from your desk, say "you have my undivided attention"
    - Don't be casual with email
    - Be proactive about status reporting - bad news is always better early – let the client know as soon as you know when a deadline won't be met

2. Identifying and Meeting Expectations
    - Ask a lot of questions and understand: what your role is, what the deadlines are, who is involved and the scope of the matter - then take it to the next level
    - Don't say "no" or "I can't" instead suggest another way or offer to refer to the person who can help them "Unfortunately this isn't really my area of expertise, let me put you in contact with…" or, "Would it be acceptable to have it to you by 4:00 …"
    - If a client is angry say you're sorry and own the problem – make sure you understand the issue, listen and show empathy then follow up to ensure that it's resolved
    - Don't make promises that you can't deliver on

3. Professionalism
    - Don't engage in negative conversation nor speak negatively about the firm or colleagues in front of clients or vendors
    - Be a person the attorney wants to introduce to clients
    - Proof your work and have someone else in the office proof it
    - Double check client names and addresses
    - Maintain confidentiality – clients are everywhere
    - Do your research and be able to answer questions about the firm
    - Be aware when clients are expected so that they can be greeted by name

4. Teamwork
    - Make sure you know when someone is out of the office so that you can let callers know when to expect their call to be returned
    - Understand and appreciate each person's job in the firm
    - Give one another a "heads up" on projects that will be coming
    - Ask the lawyer "What's on your schedule today?"
    - If one lawyer is unavailable, offer to refer to someone else who is working on the case

5. Follow Up
    - "Did you receive the document that we sent"
    - "Did that work out okay for you?"