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ONE REALLY GOOD IDEA EVERY DAY

Running a Client Team

By Sally J. Schmidt | Oct.26.15 | Client Relations, Client Service, Daily Dispatch, Legal Marketing, Play to Win

Much has been written and said about the value of forming client teams, but a recent conversation made me realize not all lawyers understand what that actually means.

I had suggested to a law firm partner that forming a client team would be a great way to respond to his client's needs. He said, "I have a team." In reality, what he has is a group of people who consistently work with the client. What he lacks is any structure or process for those people.

So What Do I Mean by a "Client Team"?

A client team is basically a more structured and strategic approach to the client's relationship with the firm. The benefits of client teams accrue to both the client and the firm and include (among many other advantages):

- Better internal communication and coordination among those working with the client
- A better understanding of the client's needs, business and industry
- A more organized approach to client service
- Succession planning and expanding the number of relationships

Although it should not be the purpose of forming a client team, most firms also find a formal team will result in additional work and cross-selling opportunities.

Putting a Team Together

Whether or not your firm has a formal client team program, anyone can employ the model. When putting together a team for a particular client, start with the people who currently service the client — usually considered the "core" members of the team. Then add:

- People who don't work with the client but with whom the client might have a relationship. For example, one of your colleagues might live next door to the company's CFO. (Check your firm's CRM system or LinkedIn for leads.)
- Those who might be able to make a contribution to the client's cause or to your internal discussions, such as the firm's HR manager if it's a staffing company or your firm's IT Director if it is a tech company.
- People who may be able to help the client prospectively. For instance, you could invite a lawyer from another location where the firm has an office but currently does no work for the client, or someone from a substantive area the client might need but has not yet used.

- Other administrative people who would benefit from hearing discussions about the client and its needs — administrative assistants, accounts payable staff, etc.

Potential Team Activities

Now that you have a team, what do you do? The goal is to develop methods to collaborate and share information so the team can serve the client on a more consistent and coordinated basis. Here are just a few examples of possible activities for your team. (Some may involve just the core group, and some the larger group.)

Background. Many client teams will start by asking marketing staff or the library to put together a "dossier" on the client. Everyone on the team will benefit from learning more about the client and the business. You might also set up alerts (via Google or otherwise) to stay apprised of news about the client or its industry and share throughout the team.

Client feedback. Some client teams will incorporate a client interview to get first-hand information from the client about how things are going, the perceptions of the firm, and ways to improve service.

Client plan. The group should put together a plan for the client — what will we do to build this relationship in the coming year? Activities could include:

- Taking a tour of the company
- Assigning team members to certain company personnel for entertainment
- Giving workshops on substantive topics to the client's in-house legal department
- Establishing a more formal status reporting system for the client
- Introducing client personnel to others in the firm
- Introducing the firm's lawyers to other people from the company

Updates. It is valuable for the team to meet from time to time to talk about the client and its work. This could involve only the core team or the larger team, depending on the agenda. For example:

- News about the client ("I was out there today and learned …")
- Client guidelines or feedback
- Who's working on what

Information-sharing mechanism. Client teams often will put in place a way to share updates or questions about the client. This could range from a simple group email list to a page and dashboard on the firm's intranet.

Client involvement. Do you tell the client about the team? In some cases, a "team" may connote "expensive" to a client, so perhaps not. In most cases, however, the client appreciates the effort to organize around the company and its needs. Some firms will share an "org chart" of the team so the client has a tangible document to reference. Some firms will have the client come to team meetings occasionally to talk about their business or industry.

If you are the primary-relationship attorney for an important firm client — or a client that is important to you — you should adopt at least some of the protocols of a formal client team. Even if you only have a three-person team, the organization that causes you to communicate and create a plan for the relationship will result in benefits for both you and your client.

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