

Play to Win

Building a Solid Relationship With Clients Throughout the Client Journey

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August 16, 2022

You can prepare a dynamite brief or brilliant estate plan, but if the client journey is difficult, your client still may not be happy.

After 15 months in progress, our new custom home was completed recently. As one might expect, between COVID-19, supply chain issues and labor shortages, all did not go smoothly. I'm no house-building novice — this is the eighth home we've built — so I understand that things don't always go as planned and I know it's not always the contractor's fault. But there are good ways and bad ways to address issues that arise along the way.

The Client Journey

In marketing circles, we talk about the client journey. It's not enough to provide a great work product or result; the entirety of the client's experience — from intake to billing — directly affects the view of the services as well as retention and profitability. According to [McKinsey & Company](#), maximizing satisfaction with client journeys has the potential to increase client satisfaction by 20%, increase revenue by 15% and lower the cost of serving clients by as much as 20%.

Lessons Learned From the Home-Building Process

As I reflect on our many home-building experiences over the years, it's funny how closely they resemble experiences clients face with law firms. Here are some takeaways that may help you deliver a better client journey.

Showing Interest

The architectural phase is a big (and expensive) part of custom building. After listening to your needs and drawing up your dream home, you'd think an architect would be anxious to see the finished product. That doesn't always happen. I suppose they, like lawyers, move on to their next project. As a client, however, I'd like to think you care how this project turned out.

- If you helped a client acquire a property, build a new plant or open a retail outlet or restaurant, [go visit!](#) Show an interest in how your work resulted in something important to the client.

Updating

Construction involves a lot of moving parts. You can't frame until the foundation is poured; you can't pour the foundation until the hole is dug; you can't dig the hole until the permit is issued; and so on. As a lawyer, there are times you have to wait for others in order to continue your work, like receiving an opposing counsel's response or an agency's documents or confirmation of the trial schedule. But clients often don't know what's going on behind the scenes; they just know that two weeks have passed and nothing seems to have happened.

- Acknowledge client inquiries, even if you don't have the answer yet. Be proactive in providing status reports, even when nothing has happened. On active matters, think about setting up a regular check-in time so you (and the client) can stay on top of things.

Giving the Client Attention

As a construction client, I don't care that you're building other houses and I certainly don't want to hear about them as an excuse for a lack of progress on mine. Similarly, clients don't care about your other clients. Even though they know you have them, they want to feel like the only client you have, or at least the most important one.

- Be careful how you communicate your competing priorities.

No Surprises

Two days before my appliances were to be installed, I received an email that the dishwasher hadn't arrived and the supplier couldn't predict when it would. I quickly had to change my selection. But my nagging thought was, how long ago did they know this was a possibility? Maybe they were hoping it would come in time. From my vantage point, however, a heads-up and contingency plan would have been nice. Similarly, maybe you're really hoping you can pull something off or make an issue go away. But by telling the client about a problem at the 11th hour, you look bad and, more importantly, the client may look bad internally.

- As soon as you know something may go wrong, let the client know. Bad news does not get better with time.

Staffing With Clarity

We have had new project managers assigned mid-construction; new names just start showing up on emails. Many times, we would ask a question only to be told it was someone else's responsibility.

- For your clients, be clear about who's responsible for what. Set out a list of key players and their roles (and contact information) in an introductory email. Provide clients with an organizational chart of the team. And, when there are changes, make an introduction by email, Zoom or a meeting so clients don't have to wonder to whom the new set of initials on their invoice belong.

Following Up

I know, I know; we're all ecstatic that the house is done and we've moved in. However, there's always a punch list with new construction. Lawyers, like contractors, have a tendency to move on to the next project without looking back.

- If you need to send a [final document, do it right away](#). If you need to close out the bill, get it done promptly. Don't move so quickly to your next matter that you fail to button up the last one.

Parting Thoughts on Improving the Client Journey

I don't want to scare anyone away from building a new house. In every instance, we have been very pleased with the final product once it was done. However, challenges in the process can taint what would otherwise be viewed as a really great result.

The same is true with your clients. You can prepare a dynamite brief or a brilliant estate plan but, if clients had a difficult journey, they still may not be happy.

Remember, it's as much about the service you deliver as the services you deliver.