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Creating a Client Service Culture

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Recently, several projects have put me face-to-face with clients of major US law firms. In one instance, I facilitated a focus group of in-house counsel and business people discussing their perceptions of law firms in a particular market. In another, I facilitated a panel of clients at a firm's all-lawyer retreat. In still another, I have been interviewing major clients in various cities around the US for a boutique law firm.

As I listen to the comments of these clients who represent a wide range of interests, industries, positions and locations, I am struck by the simplicity of their concerns. In fact, most of their issues have been issues for as long as law firms have been asking clients for feedback.

Seven Basic Wants

While every client is different, of course, there are some fundamental qualities that clients desire in their outside counsel. Generally, clients want:

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- Lawyers who are proactive. They want their lawyer to tell them when they should be doing something or to take the initiative to learn more. As one satisfied client said, “I like it when they bring up issues regarding the opposing party's business and other issues I might not have thought of.”

- No surprises. Whether it's regarding the cost, the timetable or the ultimate result, clients want lawyers to manage their expectations better. Said one, “Work with us to reduce the surprises on billing.”

- Efficiency. The cost of legal services is a major concern, of course, and clients look for clues as to how a firm is managing its money. For example, one client noted about his law firm, “There's a tendency for multiple lawyers to handle the same event—it's delegated down the line—and you're charged three times for the same activity.”

- Value/Results. In some cases, value equals results. When all is said and done, clients are paying for something to happen—a lawsuit to be resolved, a contract to be executed, a lease to be signed. As a client said, “What's most important is did they achieve what we set out to achieve in a specific case.” However, in more cases than not, the perception of value incorporates both the results and the cost.

- Their best interests to be at heart. One client was particularly positive about a law firm that he feels always puts his interests first. “For example, they'll say, ‘We could do a mock trial but we think it's too expensive.’ They leave work on the table. [They] step into your shoes.”

- Lawyers who understand their businesses and issues. This involves understanding the company's products or services along with its culture and methods of doing business. The annals of client service disasters are filled with stories of law firms sending packages to FedEx via UPS, drinking Budweiser when out with representatives of Miller Brewing Company or engaging in similar infractions.

- A firm that's easy to do business with. From accessibility to responsiveness, from status reporting to invoicing, clients want their law firms to make it easy to work together. One client suggested, “Billing electronically—a Word file or anything via e-mail—would make an immediate, quick impact.” An easy fix for most law firms would satisfy this good client.

The wish list of factors above should come as no surprise to most lawyers or other professionals working in law firms. Yet why is it that clients still express dissatisfaction about these aspects of their relationships? I believe that, while the key to creating loyal clients is as simple as good communication, the difficulty for law firms comes in trying to get 10, or 100 or 1,000 people to march in step.

Institutional Client Service Strategies

Understanding that retaining and expanding client relationships is a top priority, many law firms are taking steps to institutionalize client service—in other words, to create a culture that supports, reinforces and sustains good client relationships. While many specific initiatives can be undertaken, among the most important strategies to consider are the following:

Client feedback processes. Clearly one of the most important things any law firm can do to

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ensure good client relationships is to give clients a forum to provide input and feedback about the firm. Some law firms have created client advisory boards or “boards of directors” of sorts, to provide a regular method to obtain the thoughts of selected clients. Many law firms have implemented formal client interviews, typically conducted by the managing partner or a third party. A select few have hired former clients (i.e., general counsel) to serve as client liaisons and meet with significant clients to discuss their thoughts and concerns. While there are many ways to gather client feedback, the most important thing is just to do it.

Key client initiatives. In the past, client relationships were organic and left to the whims of the originating lawyers. Today, law firms are developing strategies to manage and grow significant client relationships. For example, most large law firms have at least some efforts underway to form and reward client teams. While roles and expectations vary, these generally include attempts to formalize the group of lawyers and staff who work with the client, develop client-specific programs or communications and generally ensure satisfaction. Additionally, and similarly, firms are now developing more thoughtful client succession plans to ensure client relationships get transitioned successfully from one generation to the next.

Client experiences. A few thought-leading firms are exploring the relatively new trend in marketing called experiential marketing. Experiential marketing focuses not on institutional brand imaging or advertising but on the experience that a client has at every touch point of an organization. For example, one firm has conducted “phantom phone calls” to its lawyers and staff to determine how many of the firm's representatives answer their phones and to evaluate how people are treated. Another has hired “secret shoppers” to visit its offices in order to assess the experience clients receive, from the perceptions of the lobby decor to the treatment by receptionists.

Internal reinforcement. Finally, law firms are developing and implementing internal strategies to encourage, promote and reinforce good client service. These range from the development of firm-wide client service standards, to client service training programs for staff and lawyers, to programs that reward and recognize good service.

Conclusion

Client service can be a difficult topic to address because it seems so patently obvious. However, as law firms become larger and clients get more demanding, firms need to ensure that client service involves more than an inspirational poster on a wall. Law firms that take steps to ensure that client service is an intentional and institutional priority will be rewarded in the long run.

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