Play to Win

Legal Client Service Protocols: Tips to Ensure Things Don't Slip Through the Cracks

By Sally J. Schmidt
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When you do something repetitively, it's easy to go on autopilot. Establishing client service protocols can help ensure you're paying proper attention to the client.

I'm a very frequent flyer (over 3.6 million miles on Delta) so I know the drill. Recently, I was going through the CLEAR line at the airport and got picked for random screening, meaning I had to produce an ID. It was only then I realized that, when I changed purses before leaving the house, I hadn't grabbed my license. Fortunately, thanks to my helpful husband (and my penchant for getting to airports early), my ID arrived in time for my flight. It got me thinking, though — when you do something repetitively, it's easy to go on autopilot.

Consider It From a Client Relations Standpoint

This incident reminded me of a speaker we had at a Legal Marketing Association conference a few years back. David Epstein, author of "Range: Why Generalists Thrive in a Specialist Environment," explained that most of the best professional athletes had played several sports and how specialization can be detrimental to performance. While I can't remember the exact statistics, I recall he said the patients of doctors who perform different types of joint replacements (e.g., knees, shoulders, hips) have fewer issues than the patients of those doctors who do just one type of replacement (e.g., knees) all day, every day.

Now, I'm a big believer in focusing on niches and building subject-matter expertise, and there are definitely marketing advantages. However, my travel experience led me to think about this from a service delivery and client relations standpoint. How can you ensure you don't go on autopilot when working with clients?

Overcoming Autopilot Issues

One key to remaining engaged is to treat every client matter like it's the first time you've seen it. Take a critical look at the issues involved to be sure you're not missing something. And, even if you have extensive experience in the area (which is why you're often hired), avoid the tendency to say, "I've handled hundreds of these cases" or "I could do this in my sleep." While you may think it's inspiring confidence, clients hear that they're just one of many; for them, their matter is the only one that matters.

Pointers for Setting Up Legal Client Service Protocols

Another thing that can help overcome the autopilot syndrome is to establish client service protocols or processes to ensure nothing slips through the cracks and you are paying proper attention to the client. Here are a few examples:

- **Develop an informational sheet to provide clients at the intake stage**. Map out the process that you, and they, will go through in a Gantt chart, a decision tree or a timeline of some sort. For example, if you're helping sell a business, put the major steps in a document and use that to update the client periodically on where things stand. This will also help ensure that you haven't overlooked something.
- **Establish a regular status-reporting protocol.** Maybe it's a monthly pipeline spreadsheet of all the real estate deals in progress. Maybe it's a weekly status report on litigation matters. You may know you are on top of things — but does the client?
- **Remind yourself.** Set up calendar appointments for quarterly visits or lunches with clients, schedule monthly check-in calls or calendar the status-reporting method you set up.

Keep a Checklist of Legal Client Service Protocols

It's easy to overlook details when you do things a lot. My advice: Don't leave it to chance. I now have a checklist by the door to consult before I travel. Having your own checklist of client service protocols at the ready will help you keep a critical eye on all the details of their matters.

Sally Schmidt, President of Schmidt Marketing, Inc., helps lawyers and law firms grow their practices. She was a founder and the first President of the Legal Marketing Association, is a Fellow of the College of Law Practice Management and was one of the first inductees to LMA's Hall of Fame. Known for her practical advice, she is the author of two books, "Marketing the Law Firm: Business Development Techniques" and "Business Development for Lawyers: Strategies for Getting and Keeping Clients." Follow her @SallySchmidt.