

From the Client's Perspective: How to Keep Client Relationships From Veering Off Track

By [Sally J. Schmidt](#)

June 27, 2024

It is important to see the world from the client's perspective. Whether it's related to the delivery of your services, documentation, communication or even outside activities, if you haven't learned the client's preferences, you are basically saying you don't care what's important to them.

Reasons the Client Relationship Goes Off Track

I remember a lawyer complaining that his client would never take him up on offers to socialize — lunch, baseball games, coffee. To his credit, he was hoping to build a personal relationship. I ended up interviewing the client on the firm's behalf and asked a few questions about off-the-clock activities. The client volunteered that he runs on his lunch hour and hates sports; he was annoyed by the constant invitations.

As it turned out, the lawyer's efforts to engage his client in these activities were working against him.

Over the years, I've heard countless stories from both lawyers and clients about things that may seem innocuous but can send a relationship off the track. In some cases, the lawyer hadn't considered the issue; in others, they thought they were helping; in still others, they felt the client's demands were unreasonable, not fully understanding the reason for the ask.

The Disconnect: From the Client's Perspective

Here are a few examples of the disconnect between the lawyer's and the client's perspectives:

You finished a deal, but a few time entries and expenses came in after the closing, so you sent a small straggler bill to the client two months later.

- *From the client's perspective, the deal is done, the brokers are paid, the books are closed ... and now I must find a source of money for an unexpected expense.*

You fly to visit your client, the Ford Motor Company, and rent a car at the airport.

- *From the client's perspective, the first thing I notice is that you drove a Chevy from the airport.*

You handle several real estate projects for a client and send a monthly invoice with details on the work that has been done.

- *From the client's perspective, the invoice entries are not aligned with the books. Since I need to allocate the cost of legal services back to the various projects, each of which has its own P&L, someone on my staff must go through them and figure out how to assign costs.*

The client pings you regularly for an update on litigation matters in progress.

- *From the client's perspective, I have a monthly board meeting at which I am to report on the status of all outstanding disputes, and you never get the update to me without me asking.*

You send a client a very reasonable bill for services but they are pushing back on some small amounts.

- *From the client's perspective, our company billing guidelines clearly indicate we won't pay for "Review of file," and I must constantly check your invoices and strike that entry.*

Your client contacts from Coca-Cola come to a meeting at your offices, which is beautifully catered.

- *From the client's perspective, I see your fridges are stocked with Pepsi products.*

You maintain a spreadsheet of all the loan transactions your firm is handling for a client bank. To be proactive, you send the client this status report monthly.

- *From the client's perspective, I assume you are on top of things and don't need that information unless I ask. Now I'm wondering what it's costing me for this unnecessary detail.*

You call your client to chat periodically, hoping to build a more personal relationship.

- *From the client's perspective, phone calls are annoying. I work in an office without doors so I lack privacy to talk about personal matters.*

You have included detailed time entries for your client, a contractor, as you do for all your clients.

- *From the client's perspective, I don't want my bookkeeper to see the personal legal work the firm is handling for me and would prefer less robust descriptions.*

Take Time to Learn Your Client's Preferences

Clients often use what are seemingly little things to determine how much you listen or care. How would you feel if you worked at UPS and your law firm sent you an overnight package via FedEx? If your name is Megge but emails are always addressed to Meg? If you are a Microsoft representative and your law firm sets up a Zoom appointment?

If you're looking to enhance your relationships with clients, take time to learn their expectations and preferences. Some like detailed invoices; some do not. Some like being entertained; some do not. Some want regular status reports; some do not.

The only way you'll know is if you ask.

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.