



How to walk the client – centric talk

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It's time to get serious about service!

If you haven't already added the term "client-centric" to your firm's vocabulary, it's time you did: Adopting a client-centered approach is what the future of our business is all about.

Simply put, we need to refocus from ourselves and what we need, to our clients and what they need. According to a myriad of client satisfaction surveys, our legal expertise and great work are not enough: What clients want is better service.

How do clients define better service? "Taking the time to understand our business, being proactive and offering advice outside the scope of the engagement that will help us anticipate issues or follow up on opportunities. Communicating with us, and being responsive to our needs."

This is your job as the lawyer working with the client. But, it is not the job of one. Each member of your firm must recognize the role he or she plays in delivering client service. Moreover, your firm's practices and procedures need to serve the interests of the client first. The only way to make all of this second nature is to embed a systematic, client-centric approach in the firm's business processes.

How do we make this happen?

The longer term answer is to develop and implement a Client Service Program that integrates policy commitment, practice management and business development.

But much can be accomplished in the short term. Whether you are a firm of one or one thousand, here are three key strategies that can support you and your firm in making the client the centre of your attention today.

I. Know your client

RE-ORIENT YOUR APPROACH

Commit to a 'Know Your Client' (KYC) mindset. Proactively manage the relationship by knowing all there is to know about your client's business, the key players and what they do, the business climate in which the client operates, and the challenges and opportunities the client faces. Use the many free or fee-based business research resources available on the internet to gather this business intelligence.

Draw on this information in your next client meeting. Being able to put your legal services into the context of your client's business not only demonstrates interest, but also provides you with an opportunity to identify other legal services that the client may not realize he requires. You might even consider asking the client to share his business plan as further orientation for the legal services that you provide now or in the future.

Finally, you need to invest time thinking about all of this and how you can meet more of your client's needs.

INTEGRATE A KYC APPROACH INTO PRACTICES AND PROCEDURES

To walk the KYC talk, your firm's infrastructure must promote and support the effort:

- Make the KYC investigation a required element of the pre-engagement and engagement processes. Foster the attitude that KYC is as important as doing a conflict check. Use an external contract resource or your library or marketing staff to continuously gather and analyze the business intelligence.
- Track this information using one or more of the many information technology systems already in place at the firm: accounting and docketing (PCLaw/CMS/Elite), case management (Time Matters/Amicus) or client relationship management (InterAction/Elite/Microsoft). Establish a process to integrate this information into a comprehensive client profile that can be used as a reference tool for building that relationship.
- Facilitate a KYC knowledge-sharing strategy within the firm so that all lawyers involved are better informed and more effective in meeting the client's needs.

II. Manage your client's expectations

RE-ORIENT YOUR APPROACH

A satisfied client is one whose expectations you've been able to manage, meet or even exceed. The KYC approach positions you to better understand the client's expectations, and to lead him or her through the legal process and its anticipated outcomes and costs. Effective communication and responsiveness throughout the matter helps you then better manage these expectations.

- At engagement, discuss fully the key aspects of the legal work to be done and how this might affect other aspects of the client's business. Define the role of client and other players, identify the objectives and course of action, communicate progress and take instructions, and establish and be prepared to reset timelines.
- As you proceed through the matter, timeliness and communication are priorities for the client. Ensure that you meet deadlines and communicate regularly whether there have been progress or setbacks or inaction. It is your client's matter so make her feel like she owns it by sharing the status. Consider providing guides or outlines to allow your client (and those to whom she accounts) to better understand the legal issues, legal processes or anticipated consequences. This makes it easier for your client to consider other options or constraints that inevitably arise during the course of the retainer. You must find ways to demonstrate your value and this is one way to do so.
- Use the billing process to reinforce the value that your services represent to the client. Few clients expect free services; all clients expect value for fees. Pay attention to the significance of the work to the client. Be aware of his cost constraints. Identify what represents a fair fee for the work done. Focus the discussion on how you were able to solve the client's problem or make an opportunity a reality.

MANAGE CLIENT EXPECTATIONS WITH SYSTEMATIC PRACTICES AND PROCEDURES

Like it or not, a more systematic approach to managing client expectations means making procedures more disciplined.

- *The engagement process:* Create a procedure that standardizes the type of information to be reviewed with the client. It should require that a form of engagement letter be drawn. A written record benefits the client by bringing clarity and discipline to the process: Clarity because the written record is a reflective one that can be readily discussed and revisited; discipline because the procedure ensures that tough questions of outcomes, timelines and costs that are so key to clients are addressed. Make precedents of engagement letters readily available to lawyers in the firm.
- *The file management process:* Insufficient communication and procrastination are two common complaints made by clients against lawyers. Use case management and tickler systems to stay on top of the work and the relationship. Provide training to help lawyers work within these systems. As well, promote better organization, early delegation and teamwork. Set standards for communication which reflect the frequency, mode and content needed by the client. Consider monitoring compliance with these systems when evaluating performance and assessing compensation of the lawyers and their staff.
- *The billing process:* Build flexibility into billing systems: Consider a variety of hourly rates or tracking of fixed fees. Develop procedures to ensure accounts are sent frequently

(to avoid large accounts which most clients dislike); all accounts of substance should follow a certain format that includes a narrative that tells the story of the value provided, and include guidance on how to have an advance 'billing discussion' with the client.

III. Empower your client

RE-ORIENT YOUR APPROACH

Now comes the ultimate badge of service – empowering your client through your relationship with them.

- Help make your client look good and more effective in her business role; find ways to help him build a more informed team, or avoid or better manage risk.
- Provide the client with value-added resources. Don't be afraid to give clients precedents, research analyses or other sample work product. Having a highly educated and empowered client does not mean you will not be needed. On the contrary, you will be seen as being vital to their success and worthy of remuneration.
- Enhance what you offer with connections to other lawyers in the firm or to other service providers that the client may need. In so doing, you become a highly valuable advisory resource to be called on for any kind of business challenge or opportunity.

EMPOWER YOUR CLIENT WITH SYSTEMATIC POLICIES AND PROCEDURES

We're quick to see speaking engagements or writing for publications as good profile-building opportunities – but we dismiss client-specific empowerment as a waste because it is non-billable time. The reality is that efforts specifically directed to clients will enhance the relationship immediately and generate more billable work. To systematically empower clients, consider the following:

- Sponsor the creation of tools that will help the client do his job better, such as education or awareness-building programs, master checklists, 'getting started' outlines, research analyses, FAQs and tip sheets, forms of documents and precedents as well as knowledge-sharing tools and professional development programs.
- Facilitate development of customized solutions for clients so that they can address their issues and also be educated on avoiding those issues in the future, all at a cost that reflects the value to them. Risk management services related to the services already provided are highly desired by clients and reflect a proactive approach.
- Promote cross-selling of services to clients to deepen the relationship. It is in the client's interest to know about other areas of expertise the firm has to offer. It is in the firm's interest to ensure that client needs are met with other areas of expertise.

PARTING WORDS

We dismiss the call to refocus at our peril. Our clients say that a significant number of lawyers are not making the 'service' grade. In a profession where our very role is premised on serving the client, that reflects poorly on all of us. Clearly, the time has come to pause and refocus, and go back to some basic service principles. We must be proactive about understanding and meeting the needs of the client as perceived by the client. We must heed the fact that the client's perception is our reality. We must get serious and deliver on our 'service' promise.

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Client service policy

FORMALIZING THE COMMITMENT TO SERVICE

A policy will take shape by doing the following:

- Clarify for all members of the firm what client service means (meeting clients' needs) and how it is to be achieved (being responsive and proactive).
- Identify members' respective roles based on their touch points with clients, whether they handle accounting and finance, office services, word processing, technology or rendering of legal services (e.g. other lawyers, clerks, students).
- Commit to a set of standards or protocols that enhance the clients' experience in dealing with the firm.

- Include reference to the three strategies of 'Know Your Client', 'Manage Your Client's Expectations' and 'Empower Your Client.'
- Also include commitments to ongoing communication, offering 'best' solutions, ensuring timeliness and efficiency, promoting knowledge sharing, sponsoring innovation and acting on client feedback.

Once in place, firm management must champion the policy, and ensure that training about and adherence to it are active.