

Getting to Wow!

Improving Satisfaction One Client at a Time

Reid F. Trautzⁱ

"Quality in a product or service is not what the supplier puts in. It is what the customer gets out and is willing to pay for. A product is not quality because it is hard to make and costs a lot of money, as manufacturers typically believe. This is incompetence. Customers pay only for what is of use to them and gives them value. Nothing else constitutes quality."

--Peter Drucker

In today's consumer-driven environment, clients expect quality legal abilities as the starting point for their attorney-client relationship. When you agree to represent a client, they presume you will provide an acceptable legal result—not always a win, but results within the scope of their expectations. In addition, clients now demand legal *service*, not just results.

Contemporary market research shows that service is the primary component of client satisfaction. Clients want quality service throughout the entire legal process. They want the opportunity to be timely informed and involved with *their* future. They want their questions answered promptly, your office to be convenient, your staff to be competent and friendly, and any results or important development conveyed almost the moment you receive it.

Why is this stuff so important? Because legal services are intangible. There is no product a client can touch, feel and smell like a new car, house or computer. To make up for the lack of things tangible, lawyers need to emphasize service.

These are the keys to a successful client experience—from the client's perspective. And from the lawyers perspective? A happy client is a paying client. A

paying client is a loyal client. A loyal client refers business. Address these common needs of clients and it will make a positive and profitable lawyer-client relationship for you as well.

Before rushing off to make clients happier, let's spend a bit of time looking at the psychology and dynamics behind effective client service. Knowing what clients are looking for can help focus our efforts on improvements to our client service system.

The Principles of Building Rewarding Client Relationships

1. *Nothing is more important than building a client relationship of trust and respect.*

- A client that knows and trusts you will rarely complain or sue you.
- Only make promises you know you can deliver. Deliver more than you promise.
- Be objective. Give all clients an honest assessment of their situation.
- A client who feels appreciated is cooperative, pays their bills, and refers new business.

2. *Communication is the key to building trust and respect.*

- The goal of communication is for the client to feel safe, understood, and cared for.
- Reduce uncertainty by explaining matters thoroughly.
- A lawyer who is accessible to clients is far more valuable than one who is not.
- A lawyer who communicates with clients will become a trusted advisor.

3. *Choose your segment of the marketplace. Step out of it only when you are prepared to meet the demands of that new market.*

- Not all clients are equal. Some demand more, others require less.

- The key is to select clients whose service expectations are equal to their payment expectations. (You don't find Wal-Mart prices at Nordstrom, or Nordstrom service at Wal-Mart.)

- Select clients that will respond to your ability to serve them, communicate with them, and build an expected relationship with them.

4. *Delivering service outside of your market segment causes increased risk. Risks of complaints, failure to pay, dissatisfaction and disloyalty.*

- Consider dismissing any current clients that place you at risk. Follow all ethics rules if you do decide to dismiss any clients.

- Review your intake process to weed out potential problem clients.

Twenty Client Satisfaction Tips

To implement these principles, and meet client service expectations, firms may wish to incorporate the following tips into their client service system. Use these tips to make selective changes to your client service system to improve the client experience, and make your practice more rewarding with less risk. Don't try to make too many changes at once, but resolve to make improvements over time.

1. Schedule a thorough review of your new client welcome process. Step by step, how does it look from the clients' perspective? How can you improve the "little things" that differentiate your business? Replace paper cups with china mugs, improve your intake forms, provide a "New Client Information Packet" with your business cards and other informative documents.

2. Develop a reputation for not tolerating any nonsense around getting paid for your work. Make sure you fulfill your part of the bargain by setting fair and reasonable fees that have been fully and carefully discussed in advance and throughout the course of the file, and then insist that the clients meet their obligations to you. Don't cut deals. Don't accept excuses. Subject to your ethical obligations, don't keep working for clients who fail to pay. After a while, you will find that clients who don't want pay your bills will screen themselves out of your client base. Remember, it is a myth that it is always better to have more clients; what is critical to success is to have more of the right clients.
3. Charge an initial consultation fee. It sets expectations of paying for the representation. At the end of the consult, you can choose to apply the consult fee to the first bill or your flat-fee. If you choose not to accept the client, you can opt to return the check provided before the consultation.
4. Communication is the key to a successful client relationship. From the moment the client first contacts the firm, through the initial intake, and until the file is closed. Make sure the client communication process has multiple opportunities to update the client; use forms and form letters to make it more efficient (and less-costly) to frequently communicate with clients.
5. It is up to you to take the initiative to discuss fees and costs (disbursements) openly, candidly and comprehensively, preferably at the first interview. Don't sugarcoat what the work will really cost to rope in the client. You are just planting a land mine in the middle of your relationship, and sooner or later it will explode.
6. Spend enough time at the beginning of the relationship to find out if the client is able and willing to pay a reasonable fee for the legal work they want done. If they aren't, say, "For your sake, I am glad I found that out before I did the work and ran up a larger bill than you wanted to pay for the services you need."
7. Avoid bargain-hunters. They won't appreciate lower fees; in fact, they will probably think your fees are too high, no matter how much you cut them. And don't do loss-leaders: they create expectations that you will continue to charge low fees, which is inconsistent with your intention to charge your regular fees in the future.
8. Send a client satisfaction survey to all clients. There are on-line services that offer free trials on a limited basis, such as Zoomerang and Survey Monkey.
9. This may surprise you, but not every client deserves full service treatment. Some clients just can't be satisfied no matter how hard you work. The harder you work for one client, the less time you have to work for clients who appreciate your services. In fact, you can dig a pretty deep hole trying to please every client. So for those few clients who seem impossible to please, evaluate the reasons the client is dissatisfied.
10. Reduce all your fee arrangements to writing. If the fees will be a significant amount (in the client's eyes), get the client to sign a fee agreement. The fee agreement should outline

the scope of the services to be provided, their timing, how the fee will be calculated, what costs will be charged and the terms of payment.

11. Set appropriate fees. Have empathy for clients, but that does not equate to setting fees so low you lose money.

12. Value Bill: There are some tasks we may charge to a client, but choose not to charge for one reason or another—maybe it took less time than we thought or we had a new associate take much longer to do it. That may be the right decision, but the task or event provided some value for the client. Instead of writing it off and ignoring it, add it as a “No charge” item on the client bill. Let them see that they are getting more service than promised. That adds value in the eyes of the client.

13. Get to know your clients. Show them that you care about them and their problems. If you have business clients, get to know their businesses and the industries in which they operate. Get to know their people. Read their annual reports. Find out if they have websites and familiarize yourself with the information on them.

14. Develop your listening skills. Learn how to encourage your clients to talk and how not to interrupt. Learn how to communicate attentiveness. Use appropriate body language. Learn how to be still. Don't play with paper clips. Don't gaze out the window. Don't allow interruptions.

15. Promptly return all client phone calls—the same day or within 24 hours. If you cannot, assign a person from your office to make an interim call to the client to attempt to facilitate the communications

16. If unanticipated developments in a file mean that your fee is going to exceed your client's expectations, discuss the increase openly and candidly at the earliest opportunity so the client can decide whether to bail or continue. Don't assume that because it is evident to you that the additional work is needed and should result in a higher fee, it is evident to your client.

17. Show your clients how hard to work for them. Demonstrate effort. However, you don't want to make a major production out of everything you do. Use common sense and good judgment when implementing this tip.

18. Bill regularly. If you send your bills to clients on a regular basis they are more likely to pay them on a regular basis. Sporadic bills are not taken as seriously as bills that arrive at the same time each month.

19. Make your bills clear and informative, with a format and layout that is easy to read. Ask a several clients, your spouse or other non-lawyer to review several samples of your bills--redacted, of course! Is the wording free of jargon? Can they understand how the amount of the bill was calculated? Your goal should be to produce bills that are perceived by your clients as fair. Clients are more likely to pay bills they think are fair. The larger the fee,

the more care should be taken in describing work you have done. “Services Rendered” or unsubstantiated terms like “Research” should never used on a legal a bill.

20. Don’t worry if you some mistakes in evaluating your clients. Move on and resolve to do better next time. Remember, **good judgment comes from experience, and a lot of that comes from bad judgment.**

The Added Benefit of Superior Client Service

If you have provide client-centered service as part of your overall delivery of legal services you will create a group of satisfied client who will become your greatest source of new business. You will no longer be a marketing force of one or several, but of many. Loyal client referrals can provide quality clients that money cannot buy. Over time, the personal referrals from clients, friends and family will allow you to diminish your marketing efforts to reach potential new clients, but you will still have to have a well-managed practice that will help earn and maintain the trust of the personally-referred clients.

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ⁱ [Reid Trautz](#) is a lawyer, author, and [blogger](#) on the issues of business process improvement, technology, legal ethics, and attorney-client communications. He is co-author of [The Busy Lawyer's Guide to Success: Essential Tips to Power Your Practice](#), published by the ABA. Reid currently serves as the chair of the [ABA TECHSHOW](#), the legal profession’s premier technology conference, sponsored by the ABA Law Practice Management Section and held each spring in Chicago.

Over the past decade, Reid has helped thousands of lawyers solve their most difficult and pressing management issues with innovative, ethical and practical solutions. Prior to his focus on the business of practicing law, Reid was a partner in a five-lawyer firm in Alexandria, Virginia.