

Optimizing Client Service: Delivering Value and Enhancing Experience

Executive summary

In a low growth, low demand market where competition is only getting fiercer, holding on to clients has to be every law firm's priority. And when it comes to client loyalty, legal expertise and a strong track record of results just aren't enough. They are, in fact, just table stakes for any firm that seeks to compete on a more sustainable platform than price. What sets a firm apart in today's market are the intangibles: empathy, inimitable client experience, and the sort of value that doesn't show up on the bill.

With contributions from a wide range of authors working within legal services and beyond, *Optimizing Client Service* examines how legal services firms can achieve competitive differentiation through outstanding client service, including: designing and implementing a robust, business-wide client feedback program; developing their understanding of the client experience; and innovating in its truest sense, to deliver empathetic, valuable service.

The book is split into four parts, each focusing on a different aspect of optimizing client service: Know Your Client; The Client Experience; Client Service Innovation; and Client Loyalty.

As the author of the opening chapter in this book notes, "if you are not listening to clients, you are driving the firm's strategy by looking in the rearview mirror". In Chapter 1, Nathaniel Slavin, partner and founder of Wicker Park Group, describes why firms that listen and adapt to the voice of the client will see enhanced realization rates and greater client loyalty, and he describes the steps to take to design and build a first class client feedback program.

As "the forum for advantage" shifts from whether firms are capturing client feedback to how well they are doing this,¹ Chapter 2 from Sally Dyson, director of Firm Sense Limited, considers the ways firms can and do use client feedback, and how they can develop plans to respond to feedback across practice groups and offices. This chapter is illustrated with illuminating examples from firms with sophisticated and longstanding client feedback programs, including Allen & Overy, and Eversheds Sutherland.

In a world overflowing with data, firms that are harnessing this data and using it to learn about their clients and marketplace will gain a competitive advantage. Chapter 3, from Mark Medice and Jennifer Roberts at Intapp Client Success, explores techniques to move firms towards service differentiation through client intelligence.

Also on the theme of capturing and using client intelligence at a firm-wide level, in Chapter 4, Harriet Creamer, director at Outer Circle, looks at the vital role of your knowledge management workers in harnessing knowledge across the firm to provide greater value to clients.

Part Two of this book focuses on The Client Experience. In Chapter 5, Andrew Hedley, director of Hedley Consulting, explains why client journey mapping, and the activities that flow from it, is essential for understanding client experience, and he provides pointers for law firm leaders to consider when introducing the techniques to their firm within a wider business development strategy.

It is widely accepted that word-of-mouth referrals are the surest route to acquiring new customers; understanding how likely a client is to recommend your firm, and why, is one of the most powerful pieces of feedback a firm can receive. In the next chapter, Liam Brown and Megan Heltemes of Elevate Services, Inc., explain how to use Net Promoter Scores to quantify customer loyalty, predict future growth, and to deliver an optimized service experience.

This is followed by a chapter from Douglas McPherson, director of Size 10½ Boots, who describes the external and internal processes for creating and validating a client value proposition that reflects the firm your clients want, not the firm you think you should be.

The final chapter in this section from Peter Lane Secor, director of strategic pricing and project management at Pepper Hamilton LLP, tackles the nebulous relationship between pricing and client perceptions of value, and examines the results of not defining value at the outset, some methods of demonstrating value, and fee structures designed to mirror the value provided.

“Innovation” has been something of a buzzword in professional services for several years, but as Lane Powell’s director of strategy and pricing, Eric Meltzer, explains in the first chapter in Part Three of this book, however novel they may be, solutions are only valuable when they solve problems or produce results that people care about. In this chapter, Meltzer describes Lane Powell’s approach to crafting and delivering client solutions, based on a deep understanding of their needs.

This theme runs through the next chapter from Paul Williams, partner at Shook Hardy & Bacon, who provides an example of the power of partnership between law firm and client.

Customer expectations and perceptions of service have changed, and this includes law firm clients. Law firms require a shift in mind set even to keep up with, let alone exceed, these expectations. Patrick Fuller, vice president of business development at Neota Logic, Inc. discusses the organizational and cultural shift required to drive a client service mind set internally.

Great service and real value drive loyalty. This is the focus of the final part of this book. Alicia Fortinberry and Bob Murray, founders and principals of Fortinberry Murray, look at the science behind building client engagement and loyalty to the firm.

David H. Freeman, chief executive officer of the David Freeman Consulting Group, then shares the approaches of “master” rainmakers when it comes to driving client loyalty through the delivery of exceptional client service.

This is followed by a chapter from Andrea Maciejewski, director of client engagement at Levenfeld Pearlstein, LLC, who shares how her firm has placed client experience at the heart of everything they do, and the results in terms of client service and loyalty.

Finally, Nathaniel Slavin, partner and founder of Wicker Park Group, explores the value that doesn’t show up on the bill – the kind that will really move the needle on client loyalty. He discusses six key areas in which firms can provide greater value to clients, and highlights some of the questions firms should be asking in each area to better understand client preferences.

Most legal service providers believe passionately in client centricity as a core value; as the chapters in this book show, the challenge is to understand what clients value, how they experience your business, and know how to translate that into exceptional service. In a fast changing market, legal service providers need to engage in an ongoing dialogue with their clients, and they need the agility and focus to ensure that they can adapt as client needs change. This, in the end, will drive client “stickiness”, enhanced reputation, and growth.

References

¹ Sally Dyson quoting then director of business development at Ashurst, Chris Sutcliffe, in her book *Client Listening: Why it Pays and How to Do it* (ARK Group, 2013): “the forum for advantage may have moved on to ‘how well are you responding? rather than ‘are you doing it?’”