Zen & The Art of Legal Networking

INSIGHTS & COMMENTARY ON RELATIONSHIP BUILDING WITHIN THE INTERNATIONAL LAWYERS NETWORK

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Lindsay Griffiths

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Using Client Feedback to Create Truly Meaningful Client Experiences and Deliver Greater Value

After lunch, I headed to "Using Client Feedback to Create Truly Meaningful Client Experiences and Deliver Greater Value" - a session that proved to have some fabulous tips. The panel was moderated by Julie Meyers of Burns White and featured Ronna Cross, from Patton Boggs, James Perkins of Procopio, Cory Hargreaves & Savitch, Jennifer Skiver, Allen Matkins Leck Gamble Mallory & Natsis, and Tara Weintritt of Miles and Stockbridge.

Best Practices

The panel began by sharing their best practices for starting a client feedback program:

- Get a promise from the firm leadership that they understand that the feedback is critical and they're willing to take action.
- Know your firm's culture going into this - what's the best approach?
- Get everyone involved and figure out what success looks like.

One panelist said that he's been running a client feedback program for six years. He started by working with the Chairman, and they met with another firm doing it already. They got their best practices, shared ideas, and started small. The panel emphasized that client feedback programs are incredible data, but if you do nothing with it, it's more harmful than if you did nothing at all.

The program needs to be top down - if the firm doesn't have the culture to experiment and take risks, it won't work. And if the marketers are going to drive any project, senior management must buy in. Otherwise, it's a tough job. The culture of every firm is different though, so how you will launch it will be different for every firm.

Who Should be Involved in the Interview?

Julie asked the panelists if they cherry pick who they want clients to meet with, and they said yes. In some cases, it will be the managing partner. One panelists said that if she had a do-over, she would have a third party do the interviews. She thinks their program would have stayed on track better during the recession if that were the case. Using a third party is a short cut for the feedback process, and other panelists agreed that if you're going to do a formal program, the third party interviewer is the way to go.

An audience member asked if the relationship partner is in the room during the interview. One of the panelists said that they sometimes are, but they consider the client to be involved with an ongoing relationship with the firm, not the attorney. Another said that they lose something important on both sides when the relationship partner is there. Oftentimes, the partner tries to manage the conversation and you lose opportunities to make the process better.

Another question came up - how many people do you to talk to at the client? The answer is, it depends on the client, but in general, they've found that three works well.

Roadblocks

The panelists discussed some of the roadblocks that come up when trying to implement a client feedback program, such as "the client is too busy," "the questions are stupid," and "I know everything about the client already." One panelist had an attorney want to know how she could get information from a client if they weren't a lawyer - the answer? "It's amazing...I just ask them!"

Clients also like to be asked what their budget it, but a lot of attorneys think they won't want to answer. One panelist said that clients have always, with one exception, revealed their legal budget when directly asked.

An audience member asked whether gender factors in when choosing a third party interviewer, and the panel agreed that gender shouldn't play a role. However, everyone you talk to is different and has different nuances, so if the person interviewing the clients knows that, it helps them. The panelists recommended having someone do communication-type programs with all of the attorneys and staff.

The panelists also emphasized that as marketers, we should be part of the process to ensure that any issues that come up are addressed. One of the panelists has a more informal feedback program, so she said that if it's a more organic process, you might want to call the attorney directly about client feedback.

Yikes, negative feedback! What do we do?

Another panelist said that when negative feedback comes in, she debriefs with the managing partner on the way back from the interview and they strategize how to handle it. Generally, the best way to handle it is to have a meaningful conversation with the relationship partner - it's painful, but worth it.

An audience member wanted to know how the panelists find out whether the relationship partner takes care of any issues. In many cases, they will call the client to check and ask if they've seen a difference, and what else the firm can do. A panelist added that partners react a lot better when the other partners are looking.

If it's an issue that's more systemic or related to attitude, then it goes to the management committee. An audience member asked whether the firms have ever changed a relationship partner because of a client interview. In some cases, yes, and in others, they have added additional partners. This is a business driven by the relationship between the client and the lawyer, and often, it's just the case that the relationship isn't a match and they need to find a better solution.

Julie asked when the client becomes a client of the firm, rather than a client of the attorney, and one of the panelists said "yesterday."

Julie then asked what the marketers do to share feedback with the firm on a broader basis? They can be using it as a promotional opportunity to drive investment in the feedback program. They also let it inform the various events and other marketing and communications that they're doing. Just because it's not an attorney's client doesn't mean that he or she can't learn from the experience or feedback.

Pre-Interview - It's All About Research

The panelists talked about the process by which they conduct the interviews, saying that it starts with research. One panelist said that they spend between 4-6 hours on each client before they selecting questions. They look at annual reports, what did the company do during the downturn, do they need real estate, and much more. Additionally, they use social media tools such as LinkedIn, Twitter, Facebook and blogs to learn more about their clients. Sometimes, they enlist young associates to assist with the research that they're doing.

An audience member asked whether the panelists are using client feedback programs to drive initiatives and programs? The panelists said absolutely - one said that "In the last five years, every one of our major initiatives have been driven by client interviews."

The panelists also pointed out that marketers don't have to wait for a client interview to do their research on a client. But they said that if you're not doing at least some of these interviews with your best clients, you should be.

When faced with the roadblocks that they mentioned above, the panelists recommended turning it back onto the attorneys - one of the best questions they ask across the board is "I'm curious as to why you're not implementing this program." Another is "I'm curious as to what you think we're going to hear." Using the word "curious" levels the playing field.

Other Ways to Get Buy-In

Julie asked the panelists to comment on what other tools are out there to help them sell this to their attorneys. One of the panelists said that consultants have the expertise and the toolkit. They want to make you look good, so they can often help you get buy-in. They also suggested using other people's experiences and successes - show what other firms are doing. Tell the partners that if they want to be excellent, excellence is by design and client feedback is an important part of excellence.

So if you're a superhero, and you've done everything, what next? Then, you need to develop long-term touchpoints during the interview. The attorneys get this business, so get them to think of ideas as to how to follow up long-term. The panelists also recommended looking outside the legal business for inspiration for client service programs.

The panelists said that in general business, 65% of clients will leave a vendor because of a bad employee interaction - this can happen in the legal business too. The final takeaway was that no matter what your firm size is or where you are in your firm culture, you can make a difference using client feedback. The panelists also highly recommended "Lessons from the Mouse" as a good book to read.

Lindsay Griffiths of the International Lawyers Network
179 Kinderkamack Road
Westwood, NJ 07675
Phone: (201) 594-9985
Fax: (201) 740-9765