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Preventing "Lawyer Meltdown" and Creating Productive, Profitable and Enjoyable Law Practices

Don't Let Clients Flounder – Be Their Guide

By Allison C. Shields, Esq.

Have you ever heard stories about college fraternities blindfolding their pledges, driving them to a remote location and dropping them off with no money, maps, or other equipment, leaving them to find their own way back to campus?

Don't do the same to your clients.

Without clients, your law firm can't survive, regardless of your technical legal excellence. The more comfortable you can make your clients, the better the attorney-client relationship will be. And the better the experience your clients have with your firm, the more loyal and satisfied they'll feel, and that translates into more work and more referrals for your firm.

Your clients come to you to solve a legal problem or to take advantage of an opportunity. They look to you not only for your legal expertise, but also for your guidance and reassurance. When discussing client-focused practices and systems with lawyers, I often relate the dictionary definition of a client.

The secondary definition is the definition we're most used to, "a person who engages the professional advice or services of another." But the primary definition of "client" is **one that is *dependent* upon another.**

Your clients are dependent upon you - not just for your technical legal advice, but for your ability to guide them through the legal process. Much of the friction that arises in the attorney-client relationship arises not as a result of the lawyer's handling of the legal matter itself, but as a result of the lawyer's failure to be a good guide for the client. While the client may appreciate that you get down to the business of tackling their legal problem, don't overlook the value of leading the client through the process and providing them with the tools and information to understand that process.

You have been through the process many times with many different clients, but the legal system may be a completely new and foreign experience for a client. It is often emotional, anxiety-producing and confusing. Clients value lawyers who have a good 'bedside manner,' who understand their business, who are trustworthy, and who reduce their anxiety and provide peace of mind. Being a good guide for your clients accomplishes many of those aims.

How can you improve your guiding abilities?

As always, good communication and setting expectations with the client at the beginning of the engagement are essential to creating the proper tone for the engagement and establishing your role as guide and leader.

Outline the process. What better way to build trust than to outline the process for the client at the beginning of your work together? The client's trust in your abilities and your advice will be reinforced at each stage of the engagement. Create a basic document that outlines each step in the process that the client's matter will go through. This is even easier if you are billing in stages, because you can provide the client with a reference that will tell the client what stage of the process you're in and will let the client know when new fees are due.

Define parameters and expectations. Difficulties arise between lawyers and clients when there is a misunderstanding or lack of agreement about the scope of the work to be performed and the manner in which that work is performed. These items should be spelled out in detail in your representation agreement.

Make it easy for the client to get answers. In addition to your business card or individual contact information, provide the client with other information they may need, including the names of others in the firm with whom the client will have contact (such as your secretary, paralegal, associate, calendar and billing departments) and why and when to contact those individuals.

Develop 'FAQs'. You probably get asked the same questions over and over from different clients (or even from the same client at different points in the process). Start creating a list of those "Frequently Asked Questions" - or FAQs - along with appropriate answers to those questions so that you aren't caught off guard.

Put it in writing. The more tools and materials that you provide to a client to take with them from your office, the fewer repeat questions you'll get. If you can reduce your process outline and frequently asked questions to writing (whether in print, on line, or both), you'll be providing clients with valuable information that they can refer back to again and again - and reduce the frequency with which you'll be asked the same questions.

Create a flowchart. Some clients are more visual learners and providing a long explanation or a lot of text will turn them off. Flow charts are a visual representation of the steps involved in the client's legal matter. And those flow charts also have the added benefit of showing clients which steps may need to be repeated during the process and how those decisions are made.

For clients, navigating the legal process can feel like being dropped in the middle of the wilderness with no tools or equipment. Create client loyalty and a great client experience by being an effective, compassionate guide for your clients and providing them with tools and information so they never feel lost.

About the Author

Allison C. Shields, Esq., President of Legal Ease Consulting, Inc., is a former practicing attorney and law firm manager who helps law firms create more productive, profitable and enjoyable law practices by providing practice management and business development coaching and consulting. Contact her at Allison@LegalEaseConsulting.com, visit her website at www.LawyerMeltdown.com or her blog, www.LegalEaseConsulting.com.