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ANATOMY OF A CLIENT RELATIONSHIP: A CASE STUDY

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Anatomy of a Client Relationship: A Case Study

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“All things being equal, people will do business with and refer business to, those people they know, like and trust.”—Bob Burg

David has developed a solid reputation as an aggressive matrimonial attorney. Even though a number of other lawyers in the jurisdiction have excellent legal skills, David seems to receive a disproportionate share of referrals as compared to his competitors. Furthermore, almost every person who consults retains him to handle their matter.

When pressed to reveal the secret of his success, he explains that while his marketing efforts (including thought leadership and branding initiatives as well as advertising) motivate a potential client to contact him, a strategic relationship building process is responsible for his high rate of client retention. Having broken the process into five separate stages, he shares a few tips on how to increase the chances of being retained.

Stage One—Initial Inquiry

Recognizing that you have only “one chance to make a good first impression,” David’s receptionist (Sue) has been well trained with respect to phone manner and client service as she is normally the first point of contact. Sue’s job title of Client Relationship Manager is fitting as she plays a fundamental role in ensuring a satisfactory client experience. Immediately after the first call, Sue forwards information about the firm and its practice approach to the potential client. She also confirms the appointment by phone to decrease the chances of a “no show.”

Stage Two—Initial Meeting

Upon entering the reception area, the potential client is promptly greeted by name and offered a cup of coffee, tea, or water. Testimonials from past clients collected throughout the years are catalogued in a binder kept in the reception area. Third-party endorsements help add to the favorable impression about the firm already created in the person's mind.

If David determines during the course of the interview that the individual could benefit from the firm's services, he asks if he or she is ready to move forward with the matter. If David is retained, he looks the person square in the eye and expresses appreciation for the new client's confidence in the law firm.

Stage Three—The Follow Up

Not everyone is ready to engage David's services at the initial consultation, even when it's a potentially good fit. The following technique helps prevent those people from slipping between the cracks. As he is wrapping up the interview, David poses two questions: "What additional information do you need in order to decide whether to move forward with our law firm?" "How long will it take you to make the decision as to whether to retain me?"

Presume that the individual replies that he needs to mull it over for a two weeks, David then explains that as a true counsellor-at-law, it is his duty to motivate people to protect legal interests—whether with David or another law firm. At that point, David asks the interviewee whether it is alright for him to call in two weeks if he hasn't heard from him or her. Under very rare circumstances will this offer be refused.

In two weeks, David calls and says: "As promised, I'm following up to see if you have any further questions or concerns." Some procrastinators will be motivated to move forward during the course of the conversation. Otherwise, a letter of non-engagement is sent which protects the lawyer from "the problem of unintended representation" and gives the client yet another nudge to retain David.

Stage Four—Client Service

David consistently under promises and over delivers. He gives prompt attention to phone calls and emails. Documents and correspondence are devoid of sloppy errors. He is always on time and gives the client full attention during meetings and proceedings.

As David knows that the most common complaint about lawyers is failure to return phone calls promptly, he has implemented a “phone appointment” process, which is explained in the retainer agreement.

All calls are returned within 48 hours by an attorney or staff member. A clause in the agreement explains the “phone appointment” process under which the client relationship manager will set up a specific time for a phone conversation particularly when a game of “phone tag” has been underway. At the appointed time, David reviews the file and makes the call. The game of phone tag has ended, and the client has received needed communication.

Stage Five—Conclusion of Matter

To ensure that the client understands that the matter is complete and to solicit feedback regarding the representation, a closing letter is sent upon conclusion of each and every matter. Not only does this clarify that no further services will be performed, but it also gives David the opportunity to conduct a client satisfaction survey, request a testimonial, and ask for referrals.

Lawyers who combine a philosophy of strong and structured client service with exemplary legal skills will earn loyalty as well as referrals. What changes can you implement immediately in the realm of client relationship mastery?