

# LEGAL MANAGEMENT

Facilities Management

## 10 Tips for Law Firm Support Staff on Client Relations and Quality Service

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This decade marked the end of 10 years of excess. The 1980s were a time of explosive growth, record construction and investment, mergers and acquisitions and globalization in nearly all industries. Law firms hired new and lateral lawyers in record numbers and purchased sophisticated technology to stay current with trends and demand. Lawyers, particularly specialists, were able to command high salaries and high fees from clients without scrutiny.

The 1990s present a sharp contrast to the previous decade. While technology and globalization continue to expand, corporations are downsizing and being acquired and clients now control purchases and services. Law firms feel the crunch and have been forced to reduce their own work forces in the professional and support staff ranks, to look for cost-cutting measures in overhead, health and liability insurance, and other direct and indirect costs.

As law firms scrutinize costs, lawyers and support staff must continually assess their own positions in their firms and strive to make themselves more distinctive. Increasing one's value to and visibility in the firm will help ward off workforce reduction risks.

While many factors will affect a staff member's retention and promotion, focusing on client service

and quality should help considerably. The following tips might help you in this effort.

### 1. Remember that the client always comes first.

Everything that happens within a law firm should be ultimately geared toward creating client satisfaction. Clients are not as loyal to lawyers or law firms as they used to be and other firms will always be out there vying for your firm's clients.

There are more licensed lawyers right now than there are clients who need them. Therefore, only the best will survive. Even though you may report directly to a partner or senior administrator, clients should be *everyone's* first priority.

While every client is important and should be treated as such, the firm's top clients are especially critical since 80 percent of a firm's revenues usually comes from only 20 percent of the clients. Even if the firm's largest clients are not in your department or you do not have any exposure to them, find out who they are, know their names, something about their business, treat them personally and exceptionally well.

### 2. Remember that quality is No. 1.

Quality legal work used to be evaluated on the basis of how good a litigator someone was or whether he "won the case." But quality has

been redefined. It is no longer simply the technical product that is only important. Surveys with clients show that they now assume most law firms provide excellent work product. It is quality service—the *process* of reaching the end result—that is the primary characteristic clients are evaluating.

Quality must be a top-down priority for the law firm, practiced and preached by the management committee, supported in compensation and promotion and enforced and encouraged down to the lowest paid employee. Writing a brilliant legal brief is no longer enough. Lawyers, who traditionally were not as outgoing or well-rounded as their business counterparts, now must be good communicators, anticipate problems, and be cost-effective.

Support staff must also do more than might have been expected in the past. For example, a good secretary now means more than being a fast and accurate typist or particularly loyal only to one partner.

The effective law firm now focuses on efficiency, proficiency, team work, and productivity. The support staff is a critical component of that equation.

### 3. Perception IS reality.

Quality service will be defined and evaluated by the client/customer. It almost doesn't matter if the

clients have a misperception of something you know is not the case. If they get an impression that is not what you or others intended, there is usually a reason and you have to try to correct negative impressions.

Since law firms provide intangible services, clients can only evaluate lawyers and their firms on the basis of the service they receive from everyone involved in their matters.

Many firms now conduct client-satisfaction surveys. They ask clients directly for their input—not only on legal services but on the total service experience. The feedback received must be responded to and acted upon immediately at all levels. Client feedback should be shared with teams or individuals; criticism should be constructive and not taken defensively.

Clients' impressions of the firm, its services and quality will be reflected at the support staff level in a number of ways:

- telephone contact with specific support staff members
- contact with receptionist, voice mail system and others to whom calls are referred
- work product and timeliness
- in-person contact (even a friendly greeting in the hallway)

#### 4. Be professional.

Everyone who works in a professional service firm should understand that clients will judge the firm, its services and their satisfaction based upon the firm's overall image. Image will be directly affected by numerous factors, including telephone manner, physical appearance, accuracy and timeliness of work product, efficiency, expertise, and the frequency and look of collateral communication other than work product (e.g., newsletters, announcements, brochures).

Staff members will play a significant role in enhancing the firm's professional image with those outside the law firm. You will have occasion to meet clients, vendors and other referral sources in person. Even your friends and immediate family will be affected by the way in which you con-

vey the firm and your own professionalism. Your dress, demeanor and approach can all positively (or negatively) affect how others perceive you.

Internally, staff members must also be very sensitive to the image they convey, not only as it affects the external image, but also the lawyers' perceptions of his/her capabilities and professionalism.

Channel information and concerns to the appropriate people and maintain confidentiality about and with lawyers, other staff and clients. Avoid being perceived as a "gossip" or less than trustworthy. At all firm meetings or social functions, interact with partners and associates, not just with other staff people (even at the risk of being snubbed).

#### 5. Individuals must be accountable.

Everyone must play a role in facilitating or identifying obstacles to quality service. It will not be enough for the partners to look to associates to be exceptional service providers while they themselves may not return phone calls or meet deadlines. Nor can lawyers expect more of staff than they do of themselves.

Conversely, staff members have a responsibility (and a professional opportunity) to initiate their own quality-enhancing measures.

While senior management and administrators must set the tone and establish appropriate quality service policies, individuals can and should provide momentum if it is not there. As individuals, support staff members can formulate their own professional development goals and action plans each year. If they are lacking in a skill or want to expand a skill base, they can request training in an area or seek it on their own. Even joining an outside professional peer group helps employees stay in touch with new techniques, issues and solutions.

#### 6. Pursue excellence relentlessly.

In an era of intense competition where your clients are being well-served or actively wooed by your competitors, everyone must be committed to a goal of "zero errors," superior work product and

exceptional service. Constantly striving for improved service and products should ensure client satisfaction as well as your own professional advancement. Pay particular attention to

- typos (Spell check only catches certain errors. Every document should be proofed by another person.);
- duplicating accuracy (order, omissions, quality);
- mailing lists (need constant updating);
- invoices (addition errors, time keeper allocations);
- communication with client (telephone skills, transmittal sheets);
- communication with lawyers (Be assertive about returning client calls, anticipating and meeting deadlines without crises, and communicating with you about lawyer whereabouts.);
- anticipate problems;
- expedite projects (advance notice to messengers, duplicating staff and others to avoid the crises);
- take self-improvement courses; and
- seek feedback from your peers and others.

#### 7. Know your "product."

In order to effectively service clients, respond to inquiries and portray your firm well, you must first know everything about the firm. Make it your duty to research and have easily available information so that you can refer questions and clients to the appropriate attorney or manager quickly and facilitate a faster response or turnaround:

- the size of the firm (number of lawyers and staff)
- office locations
- areas of expertise (not just the department structure)—most firms do not do everything
- who to refer calls to when prospective clients call for a particular niche
- technical capabilities, machinery, procedures
- who the spokespersons are when the press calls
- the firm's competitors: What is it

that makes your firm different? All law firms are not alike.

#### 8. Establish/seek training in quality service standards.

All employees, paralegals and lawyers must be trained to adhere to quality standards. This assumes, of course, that the firm has committed to and established policies concerning the delivery of quality legal services to meet or exceed client satisfaction requirements.

If you are to be evaluated on the basis of your ability to meet certain quality criteria, those evaluating you must understand those criteria and you must be clear on how they will be measured and quantified. Seek this information out from the personnel director—you may end up providing the stimulus (and getting the credit!) for enacting such a program or policy.

#### 9. Establish effective internal "quality" procedures.

In the 1990s, law practice, client service and marketing cross all departmental lines—so must staff support. The effective and efficient firm focuses on cooperation and team production (vs. the "I work for this attorney or this department so I don't handle that client or that phone" philosophy). If you have free time or can assist others you know are under the gun, try to do so.

Encourage teamwork and participate on special task forces. This provides you with more exposure to more people from different practices, gives you a better understanding of and sensitivity to other people and areas in the firm, and improves your ability to create better systems or approaches to effectively service clients.

Tackle specific projects with lawyers, managers, paralegals and other staff members on "quality" issues. Identify and analyze symptoms of problems and causes, discuss remedial theories and formulate solutions, test the solutions, then revise and implement a strategy.

#### 10. Demonstrate interest in the firm's client development, marketing and strategic goals and activities.

Find out what the firm's mission is and what kind of firm it wants to be five or 10 years down the road. Offer to help with marketing or client development projects. Ask if internal marketing newsletters can be shared with staff to let them know what kind of efforts the firm is making and what successes have occurred. Ask partners with whom you have contact to share their visions with you. Be aware of the marketing mentality: client service, new opportunities and potential referrals.