

Rainmaking

Making Clients Loyal through Service and Satisfaction

SUSAN SALTONSTALL DUNCAN | Clients are the reason you practice law. Thus, it's only natural if, like most lawyers, you are anxious to attract new clients to the firm. However, when they put too much focus on bringing in new clients, lawyers often miss the opportunity to retain and expand business from existing clients.

It costs five to six times more in time and expense to acquire a new client than to retain and expand business from an existing one. So how do you build a fold of loyal clients? The first step is to attract the kind of clients that are best served by and best suited to you. From there, you must provide outstanding service and results to your clients to prevent them from leaving you and going to a competitor. Here are key steps to accomplishing your goal.

Project the Right Image

Law is a service business in which the "product" is usually intangible to the client. For this reason, the client's per-

ception of you and your firm as the service provider is very important.

Work with your secretary and receptionist to ensure they know who your clients are and that their tone of voice, dress and helpfulness all convey professionalism. Keep your reception area and conference rooms clean and uncluttered, and put out fresh flowers. Have publications, firm brochures, media clippings and other materials of interest available for clients' reading. Keep your own office neat, since too much clutter implies disorganization. And dress professionally at all times—even on "casual dress" days, assume you may see one of your clients or be introduced to someone else's client.

Deliver Exceptional Service

Your primary goal is to do a great job for your clients so they will continue to use you for their legal needs and will send other clients to you. Your valued clients must be carefully nurtured and well served. Clients have come to expect a certain level of

competence in lawyers and no longer consider being a smart, capable lawyer a distinguishing characteristic. A range of service qualities now differentiates one lawyer from another—and helps lawyers retain their clients for the longer-term.

To distinguish yourself, you must first establish the right mind-set.

Every client you choose to retain and serve should be made to feel important and valued. Do not act arrogant, impatient or irritable or treat clients as an inconvenience or an interruption. Your attitude needs to be positive and helpful.

Communicate with Courtesy and Reliability

Despite the expediency of technology today, the best form of communication continues to be a live voice, on the phone or in-person. Here's a tip: Smiling while you are talking on the phone can actually make you sound more helpful and confident. Be sure to acknowledge clients by name on the phone. Also, do not ask your secretary to call a client for you and say, "I'm calling for Attorney Brown, he'll be right with you," and then put the client on hold. This makes clients feel that your time is more valuable than theirs.

Your voice-mail message should be client-friendly, helpful and updated regularly to let clients know where and how to reach you or who else



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they can call in your absence. Ask your secretary to prioritize your calls and summarize the key need or purpose of each call so you can return them promptly in order of importance.

Of course, given the convenience of e-mail, you may find that clients are able to reach you more easily and efficiently using that medium. It is also an effective way for you to exchange documents and updates on case status. But your e-mail communications should still reflect the formality and professionalism of other types of correspondence. They should be free of typographical errors and not be used when confidential information is disclosed or discussed. Like phone calls, you should review and respond to client e-mails on the day they are received. Set up a review process to enable your secretary to preview, sort through and categorize your messages.

If you are well -organized, use technology effectively and are a good delegator, you should be able to return phone calls and e-mails within four to six hours or by the end of the business day. If you cannot respond on the same day, have your secretary or another lawyer get back with the client to offer to help in your absence. Establish the relative urgency and priority of clients' needs—do they need an answer today, in an hour or in a week? And stay up-to-date on the status of client matters so you can answer basic questions about what is happening in these matters when clients call.

In addition, you should call clients when you have been able to complete a task for them that had some urgency, and to follow up on deliveries or special projects to make sure

documents have been received.

If you are not able to complete something when promised, let the client know that you encountered a delay or difficulty.

Produce Excellent Work

Clients expect lawyers to produce good work in a timely and cost-effective manner. This requires you to effectively manage cases and client matters and your team. Learn to rely on others to keep cases on track by holding team meetings of lawyers, paralegals and staff to go over each client's goals and the team's expectations, preferences, styles, deadlines, priorities, backups and vacation plans. Keep team members informed by sending e-mails, reminders and copies of correspondence and maintain a tickler system of all ongoing projects and matters for clients. Share calendars and remind team members in advance of commitments and deadlines, and let them know when you will be out of the office. Arrange for backup when you are on vacation or away for a day or more.

Work closely with your secretary to improve your efficiency and case management. Schedule 15 minutes with your secretary at the beginning of each day to establish priorities, review meetings, and identify necessary preparation, files, collateral materials and others who need to be informed. Establish a process whereby all letters, documents and e-mails that go out are checked twice for typos, grammar and citations. Develop a central file of excellent work products, precedents, forms and checklists to serve as examples. Also, you should continuously explore ways to use new technologies that will help you deliver a better product more efficiently to clients.

Gauge Client Satisfaction

Research shows that only 4 percent of unhappy customers express their dissatisfaction—but they may tell between nine to twelve other people how unhappy they are. Perhaps even more alarming are studies that show that 60 to 80 percent of customers who defect to a new service provider said they were satisfied or very satisfied with their prior provider before they defected. You cannot afford to lose your valued clients, and the best way to prevent defection is to regularly and formally seek their feedback.

Annually conduct client satisfaction surveys (by e-mail, telephone or in-person) with all clients. In addition, at the completion of each matter, conduct an end-of-matter interview or send an end-of-matter questionnaire. If you do find out that a client has decided to use another law firm, contact that person for candid and constructive feedback on the reasons for the change.

Lawyers are in the business of providing professional services to clients. What will distinguish you from the rest of the pack will be how well you actually service and interact with your clients. While some clients will focus on the end result, most will become engaged in the process of solving a problem or reaching a goal. How you help manage expectations, communications, work flow and your team—and your elicit clients' input along the way—is the cornerstone of building a strong, satisfied and long-term client base. ^{1P}