Client Consulting

Client consulting. Credit: Zivica Kerkez/Shutterstock.com

COMMENTARY

In the New Year, Be Sure to Highlight Client Service Skills

Demonstrating client service before the engagement serves attorneys well into the ongoing relationship. This checklist can help professionals discuss important topics with new clients and demonstrate their skills in quality client service.

January 24, 2022 at 04:08 PM

6 minute read

Law Firm Marketing and Business Development

By Sharon Meit Abrahams | January 24, 2022 at 04:08 PM

Starting off on the right foot with new clients sets the tone for the entire relationship going forward. Attorneys need their clients to see them as a trusted advisor and partner in their legal solutions. It is the lawyer's responsibility to educate the client and provide information about the legal process, the matter/case, and the firm's procedures. Clients see the attorney as the expert leading them through a process that can be overwhelming at times. If the lawyer takes time at the beginning of the relationship to establish expectations, then future conflicts can be avoided or resolved more quickly.

To limit misunderstandings in the future and improve chances with getting bills paid in a timely manner take the time upfront to have that candid discussion. Demonstrating client service before the engagement serves attorneys well into the ongoing relationship. This checklist can help professionals discuss important topics with new clients and demonstrate their skills in quality client service.

The Client's Expectations

- What does the client want to accomplish? By helping the client identify their true goals the attorney acts as a trusted advisor. Certain clients need more information and guidance to make appropriate decisions before jumping into legal situations.
- What are the legal steps that need to be taken? Sophisticated clients might already understand what happens when they engage an attorney however clients with no experience might not appreciate the number of steps there are in the process or the amount of time each step will take.
- What psychological forces are involved? An astute attorney will pick up on nuances related to legal actions that a client desires but will clarify the motivations before beginning any legal work. A client who is driven by emotions will be difficult to guide in a logical manner.

- What does the client expect the billings to total? Discussing overall fees and cost expectations early on helps to get the bills paid later because realistic expectations have been created. If a bill is going beyond expectations, it is best to address this sooner rather than later in the process.
- Does the client want a budget or payment schedule? Depending on the client's financial situation they might prefer to pay monthly, quarterly, or in a time frame convenient for them. It is important for the firm's cash flow to understand what the client's expectations are, so the attorney can manage it accordingly.

Billing

- Using the firm's engagement letter discuss fee structure and billing procedures. Once the attorney understands the client's needs regarding making payments, they can come to agreement regarding what is acceptable for the firm as well. Decisions around billing should be established in the initial discussions and memorialized in the engagement letter.

- Outline whether the bill has general or detailed information. In the past clients would pay a bill that stated “for services rendered” but today most clients want details. Recently clients have started to ask for diversity information about the attorneys and other timekeepers working on their matters.
- Provide individuals to contact for billing concerns. The client might be the one to directly receive the bills or the bills might pass through an accounting department. Be sure everyone responsible for reviewing bills has a contact they can call to have their questions answered in a timely fashion.
- Discuss direct costs and billing for travel. As legal work has moved more paperless, and the pandemic has changed travel be sure to talk through how costs are presented on the bills. As an interesting side note with less travel attorneys see a reduction in their billable hours.

The Team Approach

- Determine what involvement the client or their employees will play in the work. If the practice requires a collaborative approach or cooperation is needed from your clients’ employees be sure to discuss the impact on the client’s team. Identify a lead resource so everyone knows who to turn to with questions.
- Identify to the client those attorneys, paralegals and staff that will be part of the team. Really sell that as part of the legal service, the firm provides an entire team to accomplish the client’s goals. This means when the client sees the names of the team members on the bill, they will be less likely to question the bill.

- Introduce the client to all team members. Take the time to personally introduce the team members to the appropriate people at the client site. Let those who will work together have time to connect via phone or through a virtual platform like Teams or Zoom.
- Discuss the philosophy of different billing rates. Create a sense of efficiency and consideration for the client's costs by discussing the use of individuals with lower rates for certain tasks. This demonstrates the firm's consideration of their clients' bottom line.

Communication

- Discuss the client's preferred mode of communication. Ask the client if they prefer emails or phone calls for their status reports and explain who those reports will come from if not from the lead attorney. Remind clients that texting is not a preferred form of communication as it is difficult to retain copies for the files.
- Set the expectation for timing of returned calls and from whom they will be returned. If part of the firm's service is to get back to clients within a 2-hour window or within a 24 hour period tell them. Let clients know if responses are delegated to others on the team so they are not disappointed to hear from someone other than the lead attorney.
- Discuss the need for status reports. It is important to keep clients up to date on the work but be sure they understand that there is a cost to getting written status reports. Of course, the firm can choose to write off the time as a goodwill gesture as a measure of client service.