Supercharge Your Client Referrals: Marketing Through Client Service

By Reid F. Trautz

Success is the sum of small efforts--repeated day in and day out.

In the busy world of practicing law, we often focus on legal matters--how to draft this motion or how overcome that problem. It seems there is just never enough time to practice our craft. With all those legal challenges, who has time to market your services? But what if we could get others to take some of that marketing off our plate—and drive new clients to the firm?

The best source of new clients is existing clients. Surveys over many decades clearly show that satisfied clients refer their friends and colleagues to their lawyer. More satisfied clients mean more referrals. So, what makes a satisfied client?

Many of us believe that client satisfaction stems from legal success—from what we, as lawyers, put into the legal matter. However, from the client's perspective, it is more just the result; it is the client's experience during the entire legal matter. If clients based their satisfaction totally upon the legal outcome, then only clients whose legal matter is successful would ever refer new business. But unsuccessful clients refer business too. Why? Because despite the outcome they believe they received value for their time and money, and that value comes from client service.

Make service your first priority and success will follow.

To clients, it *is* the little things that matter. Ask a person who has engaged a lawyer what their biggest complaint is, and they almost always say she never returned my phone calls or he never seems to have time for me. These little things add up to one big thing: The success or failure of a lawyer-client relationship. To deliver quality service (not just quality legal results) we must focus our attention on the client.

Much of quality service is achieved through communication. It is through communication that we build a relationship of trust and respect; much of that communication is discerning and setting client expectations, and then delivering on them. If we capitalize on each client communication opportunity, we can create a strong relationship that will be valued by both lawyer and client.

Remember that client communication is multi-faceted. It is verbal communication in-person and by telephone, including one-on-one interaction as well as in group/public settings. Written communication occurs through letters, e-mail, your billing statement, and the legal documents you produce. There is also non-verbal communication to consider, including the look and condition of your office, your personal style of dress, and the etiquette and manners displayed by your office staff. All of these have an impact on the client’s experience and their ultimate determination of the value of your legal services. The greater the value, the more loyal the client, the more referrals you can expect to receive—provided you periodically remind the client of your value through on-going communications.

People probably won’t remember what you said, they may remember what you did, but they will always remember how you made them feel.

“Opportunity points” occur throughout the relationship, from the initial call to your office to the last time you shake hands with the client and thank them for entrusting their legal matter to your firm. Here are ten practical examples of “opportunity points” during the lawyer-client relationship where we can make that relationship stronger by what we communicate with the client. Use these ideas as a springboard to improve your client service, and drive more referrals from satisfied clients:

- Walk through the front door of your office for the Afirst@ time. What messages are you sending to clients when they do the same? Go step-by-step from the initial greeting through the end of the appointment. Sit in a reception area chair. Are you satisfied with what you see, hear and feel? What changes can be made to improve the client=s experience? What can you do to make that experience much more memorable for the client.

- During the initial interview and other client conferences, convey you are attentive through verbal and non-verbal cues. Listen, nod appropriately, and convey information without using legal jargon. And above all avoid interruptions from others. If you are interrupted, apologize to the client for the intrusion and let them know it was unavoidable; make the intrusion as short as possible.

- Nothing erases good client service than losing the client’s trust, and nothing erodes trust faster than a broken promise. So never promise more than you can deliver, but always deliver more than you promise. That includes returning phone calls in a timely manner, producing and delivering documents, scheduling a settlement conference or court hearing--anything. Promptly return all client phone calls the same day or within 24 hours shows you care about and respect the client. If you cannot, assign a person from your office to make an interim call to the client to attempt to facilitate the communications. Apologize if even a little promise goes unfulfilled.

- Everyone in your office who interacts with clients should have training in communication. Train your staff about opportunity points, and then work to identify and improve each interaction. Starting with telephone calls, including proper telephone etiquette, leaving positive voicemail messages, and remembering to follow-up on promises made during the phone call. Next, work on written communications, then in-person communication points.

- Speaking of communications, how good is your receptionist? Does he or she help you build strong client relationships? Do clients believe their important messages will be conveyed promptly and correctly? Are they courteous and display professional etiquette? If you do not know, then ask a friend to call in and test them, or better yet, as several clients for their feedback.

- If you do not have a receptionist or answering service, are you missing out on an opportunity for valuable communication? Are clients assured their voice messages will be prompted returned? Not everyone today needs a receptionist, but everyone does need to make sure telephone communications with clients goes smoothly every time.

- Clients want to be a part of the process. Let them. This is *their* legal matter. Show them respect: Keep them informed. Copy them on all correspondence to opposing counsel, co-counsel, or the court. Better yet, have a secure online client portal to share documents and collaborate. Keep clients involved (to the extent they desire) with productive tasks such as assisting with discovery review or writing a history of the marriage, accident, or other relevant event.

- Go the extra mile for each client whenever possible. Go beyond the client's expectations. Examples include meeting where it is convenient for the client rather than your office; staying late when a client can't meet during normal business hours; send a paralegal to assist with finding discovery documents; have a private place business clients can temporarily work when in town for meetings or depositions; spend time with staff thinking of what works for your clients.

- Clients want to succeed, but they mainly are interested in obtaining value from your services. If you win the legal battle, but leave the client penniless, have you provided value? Communicate constantly with your client about your fees. Send interim bills that convey the work you are doing. If the client questions the amount of the fee, be prepared to discuss it. When discussing a fee, do not get defensive, but use the opportunity to understand the client's perspective.

- For those who bill by the hour, there are some tasks we may charge to a client, but choose not to charge for one reason or another. Maybe it took less time than we thought, or we had a new associate take much longer to do it. That may be the right decision, but the task or event provided some value for the client. Instead of writing it off and ignoring it, add it as a "No charge" item on the client bill. Let them see that they are getting more service than promised. That adds value in the eyes of the client.

- Your monthly bills have a tremendous impact, so do not underestimate the power of this form of communication. Make your bills clear and informative, with a format and layout that is easy to read. Ask a several clients, your spouse or other non-lawyer to review several samples of your bills--redacted, of course! Is the wording free of jargon? Can they understand how the amount of the bill was calculated? Your goal should be to produce bills that are perceived by your clients as readable and fair. Clients are more likely to pay bills they think are fair. The larger the fee, the more care should be taken in describing work you have done. “Services Rendered” or unsubstantiated terms like “Research” should never used on a legal a bill.

- Develop and use an on-line client satisfaction survey. Send a link to each client at the end of a legal matter or ask on-going clients to take the survey at least annually. Some clients will respond, but almost all will be glad you cared to ask for their opinion. Those who respond with positive marks are your most loyal clients. Those who return it with negatives comments now provide a forum by which you can seek to rehabilitate the relationship before the client spreads negative opinions to their friends and colleagues.

When you meet or exceed client service expectations, you create a loyal client who will probably return for additional legal services. Moreover, that client is more likely to extol your virtues to their friends, business colleagues, relatives, or neighbors, resulting in business referrals for your services. You can and should maximize those referrals by reminding each loyal client of your valuable services. Develop a plan to regularly reconnect with these former clients through various means including e-mail alerts, newsletters (electronic and/or paper), holiday cards, phone calls and other communications. One new method of staying in touch is to create a Google News Alert for each client; if a noteworthy event occurs, you can send them a quick note of congratulations or support.

Your billable time determines your income, but your non-billable time determines your future.

The suggestions herein are not complex, nor are they easy to implement. Making improvements to your practice takes timeBtime that we would like to spend doing other things. However, improving client service is an investment in the future of your practice. Taking time now will, in the long run, raise your practice and profits to a new level you may never thought possible.