



7 WAYS TO BOOST CLIENT CONFIDENCE AND LOYALTY

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Every once in a while I get feedback from an attorney at a large firm asking why the advice I provide in my columns is targeted toward small or mid-size firms. It seems just as often I get feedback from a solo or small firm attorney asking why I target my advice to large firms. What gives? Who's right, and who's wrong?

I admit that some of the time I concentrate on providing information and creating resources which are particularly helpful to solo and small firm attorneys. I do that because solo and small firm attorneys represent the largest segment of the membership of PBA. More importantly, I do it because they do not have the depth of in-house practice management professionals that mid-size and large firms do.

In spite of my tendency to more frequently keep the needs and concerns of solo and small firms in mind, the simple truth is that most of what I write about is applicable regardless of firm size. What changes is the perspective of the reader regarding the relevance of the information.

One particular piece of feedback from solo and small firm attorneys which is consistently provided is a gratefulness for the simple, straightforward manner in which I present concepts. Yes, I try to take things down to their most basic foundation, and build from there. I don't assume a certain level of understanding or sophistication on the part of the reader. Unfortunately, it is just that simplicity which often makes an attorney from a mid to large size firm feel the information is not applicable. And that's a shame. Because the world doesn't have to be quite as complex as people tend to make it seem.

Following are some very basic methods to boost client confidence and loyalty. No matter how large or small your firm, you want to make sure you incorporate these methods into your day-to-day practice. Doing so *will* make a difference. And in today's competitive environment, every bit of differentiation counts.

1. *Understand what your client's real needs are.* Sure, most of the time clients come to attorneys with a clearly defined goal or set of objectives. So we're not talking rocket science, right? Wrong. If you assume that all the client

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wants is for you to complete the task at hand, then you will probably be limited to doing similar work for the client in the future, or perhaps waving goodbye to the client when the task is completed.

It doesn't matter whether you are serving individuals or companies. The simple truth is that clients have a whole host of needs, whether expressed or not. Attorneys who can successfully understand those needs, and proactively respond, will ultimately win client confidence and loyalty. And that translates into additional work and referrals.

2. *Become your client's partner in success.* Display genuine concern about the welfare of your client. Understand your client's business as well as or better than you know your own. Look for ways to identify competition, opportunity, and minimize risk. Be a deal maker, not a deal breaker.

What additional issues should the client be thinking about? What will it take for the client to be more successful? Where is the client accountable to others, and how can you help? Where is the client vulnerable, and how can you minimize possible consequences? What fears and insecurities of the client lurk beneath the surface which you can unearth and address?

3. *Create an action plan for the client.* Attorneys sometimes forget that relatively routine matters are often deemed far more complex from the client's perspective. You can quickly allay fears and instill confidence by providing an outline of the plan of action, and walking the client through it. You can refer back to the plan throughout the representation. The plan becomes a tool to keep the client updated. It provides the client with confidence that progress is being made. It helps the client keep pace, and anticipate when he will need to contribute to the process.

Having an action plan helps ensure that departures from the anticipated path are clearly identified and explained. It eliminates those unfortunate surprises which undermine client confidence.

4. *Hold everyone in your office accountable for delivering superior client service.* Everyone who deals with the client must be personable, pleasant, indicate a recognition of the client, and be a problem solver. There is simply no room for a "not my job" response when it comes to client service. Passing the buck works at the poker table, but where clients are concerned, it's Russian roulette. From the receptionist, to the bookkeeper, to the secretary of another attorney who just happens to pick up the phone when your client calls, everyone must



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demonstrate they're part of the team assigned to address all issues which the client needs to have addressed.

Test your procedures and technical capabilities to ensure that you have covered all the bases. You want to make sure that phone calls and emails are responded to promptly, that billing questions are addressed with speed and clarity, that emergencies are routed without fail to an appropriate party who can set wheels in motion to help. Make sure you ask all the important "what if" questions. What if you're unexpectedly unavailable? What if on top of that your secretary calls out sick? What happens in a weather emergency if the office is closed and a deadline is looming?

What procedures have you put in place to ferret out client discontent? What quality measures have you instituted to provide clients with comfortable opportunities to provide feedback and suggestions regarding your firm's services?

5. ***Handle "money issues" in a straightforward and businesslike manner.*** Clients respect skilled attorneys who are also savvy business people. When it comes to financial discussions, you should not look down and away, or awkwardly shuffle papers, or let your voice trail off, or at worst, avoid the topic entirely.

Don't be ashamed to charge what you're worth. Don't feel you have to apologize for your rates. You can commiserate with the client's disdain for the cost of representation. But that doesn't mean you have to devalue your expertise.

Don't feel obligated to take on every client who wants your services, regardless of whether or not they have the capacity to pay. If you don't have the self-confidence to make your worth a non-negotiable aspect of the engagement, why should your client have confidence in you?

You need to ask the direct questions needed to determine if your client has the ability not just to provide a retainer, but to actually pay for the services which will be provided throughout the representation. You need to make clear how billing will be handled by your office, and the payment terms. You need to make it crystal clear that you will put the pen down if the client falls in arrears. If there is to be consideration in terms of a payment plan, work out the details up front, and insist the client keep the commitment.

Allowing clients to pay by credit card can remove a lot of anxiety out of the billing and payment cycle. Clients can keep their financial problems to

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themselves by paying your bill with a credit card and then paying it off in more affordable increments. Clients without credit issues often prefer paying by credit card, because they can earn rewards. Allowing clients to pay you by credit card shifts the risk to the credit card company.

Assuming you've checked to make sure the client has adequate credit available, you also have the option of making payment by credit card mandatory for balances over a predefined threshold of dollars and/or days. The works great for certain areas of practice, such as family law.

You need to make sure your engagement agreement is clear, and that the client provides the credit authorization and information ahead of time. Then, you just need to make sure that the client has had adequate time to review the bill and raise any objections, before you actually put it on their credit card. A courtesy call when that occurs is always good form.

Never, ever forget to follow-up on those discussions. Trust me, the client will be getting calls from any other creditors to whom payment is lagging. Don't let the client assume you don't care if you actually get paid, by failing to follow up consistently and timely. I know, you're afraid the client will be offended. The reality? The client will have greater respect and confidence in a firm which operates efficiently and follows up on details. After all, if you can't even remember to follow up on a simple unpaid bill for yourself, what are you forgetting to do on behalf of the client?

6. *Focus on providing value, from the client's perspective.* I frequently mention at seminar presentations that reading the book "How to Draft Bills Clients Rush to Pay" by Jay Foonberg should be mandatory for all attorneys, young and old alike. Most attorneys think of billing as a chore. I disagree. I believe that billing is an opportunity; an opportunity to communicate to your client the value you continue to provide. If you think your bill is about hours times rate, you're missing the boat. It's about value. The value of your services—from the client's perspective—should equal or exceed the dollars charged.

7. *Always assign client work with the client's best interest in mind.* I know this sounds so self-evident you probably think it isn't worth mentioning. However, too often I see the darker underbelly of firms. What I find is that often the firm's compensation system with serve as a disincentive for an attorney to properly hand off work to the most appropriate party at the firm. There are many names for it—hoarding, dabbling, failure to delegate, milking the file—call it what you will, but the bottom line is often that the client pays for work to be



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performed at a higher rate than necessary, and sometimes by someone less qualified to efficiently handle the matter.

Some clients are relatively savvy about the inefficient manner in which their matters are sometimes handled at a firm. The trend is that clients are increasingly becoming more cognizant in this area. I know, because I am sometimes called upon by firms to interview their clients. Believe me, they often know and resent these actions. Nothing will destroy a client's loyalty faster than their suspicion that an attorney might be putting his or her own financial interest ahead of the efficient and economical management of the client's matter.

I could go on. Although I have suggested 7 ways to boost confidence and loyalty, I could have made it 10, 15, or more. However, the editor has advised that the issue in which this article will appear is already quite full. Better to be brief than to run too long and risk having a key point axed.

Clearly, this is a topic I will have to revisit in the future. In the meanwhile, I would love to hear back from *you* as to what point 8 should be. Don't think it's obvious because it's probably only obvious to you. So come on, share! Write me at lawpractice@pabar.org and give me your idea about another way to boost client confidence and loyalty. Help contribute to the next article on this topic.

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