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6 Items to Include in a New Client Welcome Kit to Promote Client Retention

developers · Tuesday, March 1st, 2022

The [Pareto Principle](#) is the theory that 80% of your results come from 20% of your effort. This principle applies to client retention, meaning that 80% of a law firm's revenue comes from just 20% of its clients.

This principle is incredibly powerful for law firms that want to use minimal resources to maximize their profits. By focusing on retaining and [improving the client experience](#) for the top 20% of your current clients, you can significantly increase your revenue and grow your law firm.

One way to start the client experience off on the right foot is to offer a new client welcome kit.

What is a new client welcome kit?

A new client welcome kit is a collection of documents that you give to new clients after the intake process or initial consultation. The welcome kit introduces the client to the law firm and its employees, provides practical and necessary information for reference throughout the case (like billing processes and key contacts), and sets the client's expectations for the representation.

What should a client welcome kit contain?

Client welcome kits will look different depending on your law firm's practice area. Some law offices create a physical welcome kit, while others prefer the ease of an electronic version. Either way, the kit should include, at a minimum, the following six items.

Administrative information

Your welcome package should include a billing document outlining your fee schedule and expenses, invoicing and billing practices (such as whether you accept credit cards), and the signed retainer or engagement letter. It should also include an introduction to the [client portal](#), plus instructions on how your client can use it, and a list of the common questions that a typical client has.

Case synopsis

A short document summarizing the client's legal matters and the legal services that you plan to offer goes a long way. It shows your client that you were listening to them and planning to meet

their needs and should include details beyond those in a standard retainer agreement.

Key contacts and bios

It's a good idea to include a short bio and key contact information for each lawyer, paralegal, and support staff member working on the case. You can also outline the best ways to communicate with each person and list an emergency contact option for after-hours or urgent legal issues.

Summary of the legal process

A clear flowchart describing the different steps in the legal process is a great tool for your client to reference throughout different phases of the representation. This helps keep your client informed every step of the way.

Client responsibility checklist

Lawyers do a lot of work on clients' behalf, but some responsibilities lie squarely with the client. A concise checklist gives the client an idea upfront of what their responsibilities will look like throughout the case. These may be responsibilities like acquiring and producing documents in a personal injury matter or the timing for making important decisions in an estate planning case.

Personalized welcome letter

We all love [automation](#), but sometimes a personal touch is what you need to show clients that you care. Include a handwritten or digitally personalized welcome letter to thank each client for hiring you.

Is there anything specific a family law firm should include in a client welcome kit?

Unlike other practice areas, family law firms handle similar matters over and over again. The client welcome packet is a great way to focus on the specific nuances of family court cases and prepare clients for the road ahead.

One option is to include an overview document explaining the basics of common family law topics, such as divorce, child custody, or the mediation process. If you create a few different documents for each topic, you can easily include something relevant for new clients.

Discovery is also particularly important in family law cases, but it can be daunting for new clients. Including a specific [intake checklist](#) in the welcome packet helps family law clients begin to track down the documents that they need to disclose at some point. This makes discovery go faster and also helps clients manage the process in an organized way.

Why is a new client welcome kit important?

A well-prepared welcome kit builds trust between the new client and the lawyer, which benefits the overall attorney-client relationship.

A welcome kit is an important tool to communicate with the client and one that presents the law firm in an organized and professional manner. A welcome kit can help manage client expectations so that your clients feel satisfied and don't become overwhelmed. It also serves as a great point of

reference for clients throughout the legal process, leading to happier, less-stressed clients who are more likely to hire you again.

Additionally, clients who trust their lawyers and have a past positive experience with a law firm are more likely to rehire and give you referrals. A new client welcome kit starts representation off on the right foot because it signals to the client that their case is important to the law firm. It also gives new clients a sense of transparency about the law firm and legal process.

When clients have realistic expectations, they are less likely to be disappointed in their lawyers. This keeps clients coming back time and time again.

Why is client retention important?

Since 80% of profits are typically made from 20% of clients, retaining that top 20% is essential. Finding new clients is also expensive, so keeping clients on board is a great way to maximize profits and decrease costs.

By spending too much time trying to turn unsatisfied clients into satisfied ones, law firms ignore the happy, easygoing clients who make them money. A better business model is to maximize revenue from happy clients by keeping them on in the future. This doesn't mean ignoring other clients and their needs but instead using thoughtful business practices that allocate resources to get the most bang for your buck.

Best practices beyond the welcome kit

The welcome kit is a great way to increase client retention, but it's not the only way. It's best to use a welcome package in conjunction with other practices designed to create happy clients. Some other tools to increase client retention include streamlining the [intake process](#), implementing easy-to-use legal [technology](#), and generating retention reports to monitor your progress.

When law firms use all of these tools together, they can have a huge impact on client retention.

This entry was posted on Tuesday, March 1st, 2022 at 12:00 am and is filed under [Practice Management](#)

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