Avoiding Common Law Firm Client Experience Mistakes

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We all know it is easier to keep an existing client than to obtain a new one, yet many firms fail to focus on practices that will ensure their clients receive a consistently positive experience with their firm. Some intentional effort in your firm's practices can make a world of difference for your clients and for your firm. The common mistakes below can be easily addressed in your firm to create a more positive client experience.

Ineffective Intake Process

The client experience begins before an individual ever steps foot in your door. By focusing on creating a positive intake experience, you will set the stage for a successful client engagement.

Train Your Staff

The individual in your firm who is processing your potential client calls should not be just anyone answering the phone. It is important that those who take the calls are trained to do so. Be sure you have the right person(s) in this seat, individuals who are capable of listening, allowing the caller to tell their story, and showing empathy. They need to understand the importance of the questions they have been trained to ask. If they have to leave a voicemail for the caller, they should have a script that leaves the potential client with a positive impression that is professional and knowledgeable.

Use Technology

Your practice management software should have the ability to input information received from potential clients. Your staff should use this format so that there is consistency in the information gathered and nothing is overlooked. This will allow you to track critical data and understand conversion rates. (Do you know how many leads you need in order to land a client?)

Respond Quickly

It is important that someone respond to the potential client quickly once the initial information has been gathered. If you wait too long, they will have moved on to someone else who is more responsive. Set appropriate expectations by giving them a timeline for a callback and stick to it.

Poor First Impression

We all know you only get one chance to make a good first impression. With a little effort, you can ensure your firm gives a professional impression consistently.

Make Your Visitors Feel at Ease

Conference rooms should be clean and tidy. Staff should be professional, offer a beverage, and make the client comfortable while they wait for the attorney. Once they have been settled, don’t make them wait. We all know how we feel when our doctors keep us waiting well past our appointment time – our clients feel the same. Don’t give the impression that your time is more valuable than theirs.

Be a Good Communicator

Communicating doesn’t just mean talking – it also means listening. Attorneys are trained to prepare their response while listening to the other party. Work to avoid that here. Make eye contact and listen. If possible, have an assistant join you in the meeting to take notes so that you can fully focus on the potential client.

Failing to Meet Expectations

Once you have been retained, it is important to communicate with your client to set realistic expectations. Failure to do so can result in a dissatisfied client who will not only fail to provide referrals but may also share negative feedback about your firm.

Set Realistic Expectations

This starts with the engagement letter, which should be clear as to the expectations of both the firm and the client, with the scope of services to be covered and the fees that will be paid in return for those services. You should also let your client know how often they should expect to hear from you, and under what circumstances.

Follow Through on Your Promises

Don’t make promises you can’t keep. Use an assistant to track all of your deadlines and timelines for client touchpoints so that you can focus on practicing law, knowing your assistant will keep you apprised of your deadlines for reaching out to clients. By having a good practice management system, your assistant can keep track of these for you with little effort.

Things don’t always go as planned when it comes to the law. When you can see things won’t go as planned, be sure to have honest communication with your client so that there are no surprises.

Communicate Well

The #1 Bar complaint is that clients do not feel their attorneys keep them well informed. If you have set appropriate expectations during the client onboarding process by explaining your policies and you follow through with those promises, you can avoid expectations not being met. If you have trained your assistant well, you can feel comfortable in allowing them to reach out to clients with updates where there is “no change” or “nothing new to report,” so that they are hearing from you and not wondering what is happening with their case.

Focus on the Client, Not the Project

Clients want to know you care about them, not just the case(s) you are handling for them. Set up Google Alerts to stay abreast of what is happening with them and have a protocol for capturing that information and reaching out to them when you see something noteworthy.

Understand life from your client's perspective. Take a moment from time to time to make a non-billable phone call to check in on them. Differentiate yourself by providing stellar client service, making them feel truly taken care of. By using your practice management software to track when you should reach out to someone again, your assistant can set these short calls for you around your schedule so that it does not feel like a burden but will go a long way with your clients.

Sending Invoices That Don't Convey Value

Providing your clients with invoices that show the value of your services is more important than ever. Think of your invoice as a marketing tool. By using a time & billing software that allows you to create templates that meet each client's needs, you can send an invoice that is not immediately met with rejection.

Use Your Invoices as Another Way to Communicate

Explain explicitly the purpose of each task. Saying "t/c with opposing counsel" does not fully convey the value of a time entry that took .8 hours. Your client may be wondering whether you were asking OC about his family instead of making progress in the case for almost an hour.

Communicate with your client by phone before sending a bill that is going to be unusually high. There should be no surprises if you want to both keep your client satisfied and also be paid in full. If you have an especially high workload in a case, it may help to bill that matter every 15 days instead of monthly.

Send bills regularly – at least every 30 days. Waiting too long results in a high bill that is less likely to be paid in full and gives the impression there is no urgency to be paid.

Failing to Use Technology

Today's clients are technologically savvy, and they expect their attorneys to be as well. Practice management software allows you to work efficiently. It allows you to:

- Automate repetitive tasks and project management;
- Streamline the intake process;
- Quickly report on the source of clients so that you know where to focus your marketing budget;
- Track deadlines and client relationship management;
- Provide well-documented case progress.

With some effort on creating protocols and training your firm staff, you can quickly have systems in place that will ensure your clients have a consistent, positive experience with your firm.

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