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Showing you care

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Practice Management analysis: How can law firms go about constructing appropriate and effective client care programmes? Peter Scott, principal of Peter Scott Consulting and former managing partner of Eversheds' London and European offices, offers his guidance on how to create a robust client care programme.

What is the need for client care programmes?

We need to be clear as to the context in which we are discussing client care.

At one level there is the narrow regulatory/compliance approach to client care which tries to reduce a very complex topic to a series of 'outcomes' and 'indicative behaviours'--see the Solicitors Regulation Authority (SRA) Code of Conduct, Ch 1 which says it is 'about providing a proper standard of service , which takes into account the individual needs and circumstances of each client'. While that is one way of looking at the topic, it is a very 'lowest common denominator' approach--if solicitors are to really provide their clients with the 'client care' their clients want, they will need to go far beyond the regulatory standard.

In my book, client care programmes should be about providing every client with what they want, in the manner in which they want those services delivered and at prices they regard as value for money. If a firm can achieve that with every client and approaches client care in a systematic and managed way, then it will be growing sustainable, loyal and profitable client relationships. That is why client care matters. It is central to law firms being competitive and indeed it is said that the only true test of a law firm's success is how satisfied its clients are.

How should firms go about creating or altering them?

It follows from what I have said above that it is not possible for a firm to create an effective client care programme, or change an existing one, unless it fully understands and accepts the needs of its market--its clients, referrers of work and prospective clients and referrers of work. How can firms go about finding out what their clients and work referrers are going to need from lawyers in the future, and what will any firm have to do to ensure that clients will seek those services from the firm rather than from a competitor? This is why surveys play a vital role if a client care programme is to be effectively developed.

What part should surveys play in client care programmes? What different forms can they take?

If a law firm is serious about putting in place a client care programme which will enable it to grow sustainable, loyal and profitable client relationships then it will need to listen to its clients, referrers of work and potential clients and referrers of work in order to understand their future needs and what will drive their choice of law firm. Ideally a firm should obtain this information from face to face meetings using either an external person skilled in such client interviewing techniques or, failing that, someone from the firm who has been trained to carry out such interviews and who is objective (ie not the client partner).

Effective interviews can also be carried out by telephone. The quality of the responses tends to be highest when such methods are employed but reduces with the use of other techniques such as written questionnaires. If conducted well, surveys should, among other things, indicate to a firm:

- o What will be important to drive client satisfaction?
- o What will determine choice of law firm?
- o What services will clients want in the future?

Unless a law firm understands and is prepared to put in place measures to deal with the responses from clients, it will not be able to put in place an effective client care programme and will most likely cease to be competitive with its rivals, and so fall by the wayside.

What are some of the fundamentals that should be addressed in such programmes?

What factors are the most important to drive client satisfaction?

Surveys will often indicate the following factors are important:

- o meeting deadlines
- o keeping commitments
- o ability to offer advice quickly and efficiently
- o keeping clients informed of progress
- o care and attention to work
- o billing as expected
- o personable and likeable people/rapport with the team
- o interest in/knowledge of client's business

Referrers of work on the other hand are likely to mention these factors:

- o knowing the individual/the personal relationship/having confidence in the individual
- o expertise/technical ability/good quality advice
- o track record in an area of work
- o turnaround time/speed ability to meet deadlines
- o a fit with client
- o location
- o reciprocation
- o working as a team

What factors are likely to influence choice of firm?

Research often shows that these factors can influence choice of a law firm:

- o perceived lack of skills and technical expertise
- o brand and firm positioning
- o lack of client awareness of specialisms offered
- o speed and other 'service' factors
- o relationship/understanding of needs
- o value for money--interestingly, price on its own is rarely a determining factor

How should client care programmes be managed and assessed?

If a firm has ascertained how it is regarded by its clients and what it will need to do in the future to not only prevent client leakage but to grow a sustainable and loyal client base, then it will need to take on board that client feedback and implement it. To be unaware of, or to ignore, client and referrer perceptions is to put a firm's very existence at risk.

However, the question then arises as to whether a firm's people are able and willing to look after the clients in the manner in which they say they want to be serviced. That is the challenge for those who are managing law firms and client care programmes.

Interviewed by Diana Bentley.

The views expressed by our Legal Analysis interviewees are not necessarily those of the proprietor.