

Walk a Mile in their Shoes:
How to Provide Exceptional Customer Services
In the Law Firm

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Have you ever met a lawyer at a loss for words? Me neither.

An attorney's main business tools are words. Lawyers depend on their ability to use words to communicate legal concepts, arguments, and documents to clients, opposing counsel, judges, juries, and the general public. Writing and speaking make lawyers money.

Do you know that it's just as important to effectively communicate with your clients when you are "off the clock"?

The better firms are at communicating with their clients, the better they will be at serving their clients. The better your firm serves its clients, the better the experience. A great experience with your law firm means happy clients, and happy clients will continue to hire you and recommend your firm to everyone.

The amount of time, effort, and energy you put into making your clients happy directly impacts the success of your law firm. If you have never focused on client experience before, you are missing your biggest opportunity to improve your law practice.

You need to say and do the right things to keep those referrals coming in. From the little "extras" your firm should be offering clients to the investments you need to make, we will show you how to get your client's talking about your firm.

What is customer service?

Customer service is a series of activities designed to enhance the level of customer satisfaction – that is, the feeling that a product or service has met the customer's expectations.

When you go to the doctor you expect to be treated professionally. You expect the doctor to be competent in his field of expertise. You expect his staff and nurses to be polite, attentive, and friendly.

When you go to a restaurant you expect that your food will be cooked properly. You expect that you will get what you ordered, the way you ordered it, in a reasonable amount of time. You also expect the waitress or waiter to be polite, attentive, and friendly.

Customer service in the legal industry is about fulfilling your clients' expectations.

Whether we are talking about customers, clients or patients, it is all the same principle. Is the person at the receiving end of your work happy with the work you

have done for them? Is the customer glad that they worked with you? Did your work meet or exceed their expectations?

Why is customer service so important?

Customer service matters today. It matters a lot.

Why? You are being graded on it. Everyone is a critic today, and they let their opinions fly on social media and on professional review sites like Yelp!, Avvo, or Lawyers.com. One unhappy client on social media can damage your reputation.

Think about how you would rate a restaurant where the food was fantastic but the waiter was rude, ignored your table, and messed up your drink order. Now think about how you would rate a restaurant where the food was average, but the wait staff made you feel like you were the only diners in the restaurant. Is there a difference in how you would rate these restaurants on Yelp? Which one would you recommend to a friend?

If you want high marks and referrals, you have to deliver high quality customer service in all areas all the time as well as great legal services. In some cases, you'll be graded more on the quality of the customer service experience you delivered than on the legal work you performed.

Please also keep in mind that not only are the lawyers and their legal work being graded, but so is every person and every thing in your office that has contact with your client.

*People will forget what you said.
People will forget what you did.
But people will never forget how you made them feel.*

Maya Angelou

So how do you consistently deliver amazing customer service to your clients? By following the Golden Rules of Client Happiness:

Rule #1. See the person sitting across the desk from you, not the legal matter.

Effective client communications happen when you stop seeing your clients as legal matters and start seeing them as people who just happen to have a legal problem that you can solve for them.

A successful service business is built on relationships between people not on a series of transactions or matters.

Don't treat people like targets or prospects or just customers or clients. Treat people like people... people with real desires, fears, hopes, wishes, worries, dreams and ambitions... just like you.

Rule #2. Treat that person like you would want to be treated if you ever found yourself in their shoes.

How would you want to be treated if you were getting divorced, declaring bankruptcy, in a car accident, fell off the roof of the construction site you were working on, buying a house, starting a business, being sued...

I am not saying you have to be friends with your clients, but you should acknowledge their pain. Most people seek out a lawyer when they are in some sort of pain. It may not be physical (although it can feel that way) but it's certainly emotional.

Why are these 2 rules so important?

By following these 2 rules, you will start to develop a personal connection with your clients. A personal connection helps people get to know you. And when they know you, they have a chance to like you, and if they like you, they might even trust you.

*People do business with people that they
KNOW, LIKE, and TRUST*

We all know that people do business with people they know, like, and trust. You need to give clients the opportunity to know you and the work you do. If you treat them right they will like you. Trust will build over time and your happy clients will refer you business.

Now that you know the Golden Rules of Client Happiness, let's talk about how you should treat your clients.

1. Think about what it's like to be your client.

What is it like to actually work with you? Have you experienced your client intake process? Think about what the client experiences when they:

- reach you on the phone,
- schedule an appointment,
- sit in a meeting with you,
- use your website, or
- receive and pay your bill.

If you don't know or if you have a hard time putting yourself in your client's position, consider hiring "mystery clients" to test your firm's customer service, as well as your systems and processes. You need to know if your firm operates as well as you think it does. If you don't know something is broken, you can't fix it.

The ultimate question you need to answer is: **Are your clients happy with their client experience?** If they are not, you need to know what's wrong so you can change it. Unhappy clients will not refer you to their friends and family.

2. Build customer service into your law firm's culture.

In order to have great customer service, it has to matter to you and everyone else in your organization.

Think about the companies that are recognized for their exceptional customer service...Disney, Zappos, Amazon, the Ritz-Carlton, Nordstrom. Customer service is the backbone of these brands. Their employees live and breathe it. They walk the talk.

So how can you walk the talk? Start by defining what customer service is for your firm and live by it.

*Customer service succeeds when it accomplishes
What the organization sets out to accomplish.*

Seth Godin

Ask yourself: what experience do I want my clients to have when they do business with me and my firm?

Write it down. Post it on the wall for everyone to see. Tell the people who work for your firm that this is what we stand for.

3. Involve everyone and everything in the firm.

Let me repeat myself: In order to have great customer service, it has to matter to you and ***everyone else*** in your organization.

Everyone = ***anyone*** who has contact with your clients and the legal matter. You receptionist, your assistant, your paralegal, your billing clerk, or anyone else that has contact with clients need to care about your client's happiness as much as you do.

Customer Service matters in ***everything*** in the law firm that the client comes into contact with.

Everything = your website, your marketing collateral, your new client intake process, your physical office + conference room, the technology you employ, any documents and paperwork, and your bills.

Customer Service does not stop when your firm's employees leave the office. You and your employees are always representing the firm. You cannot possibly anticipate every possible touch point that could influence the perception of your firm's brand. Sometimes off-duty employees do the greatest damage to a firm's reputation. Think about it. You meet a lawyer at a party. He's a slobbering drunk or an arrogant jerk. Are you going to refer him business?

4. Be unique!

Stop acting like every other lawyer at every other law firm.

The legal industry is crowded. You have competition. How can you stand out in that crowd if you look and act just like your competition?

You can't, so be unique. If you show potential clients that you are not like every other lawyer out there, you are going to get their attention.

Some examples:

- Offer alternative billing practices;
- Take credit cards;
- Use video for your attorney biographies or on the Frequently Asked Questions page of your website;
- Have an updated, professional picture of yourself that isn't taken with sitting in front of law books or at the courthouse;
- Have a cool business card;
- Offer "legal" education to the public in your practice area;
- If you don't go to court, don't wear a suit.

I know an attorney who rides Harley-Davidson motorcycles and races his Porsche. You'd never know that from the standard lawyer biography and boring picture he has on his website.

Lawyers try so hard to be nothing but professional, but unfortunately we come across as being a stereotype, void of individuality. Show some personality in a professional way.

5. Check your ego.

Stop talking about yourself and your firm on your website and in your marketing materials.

Here's the truth from someone who has bought millions of dollars worth of legal services from firms all over the world. The most effective way to market your practice is not with a folder containing the 50 year history of the firm and every lawyer biography. (That mysteriously looks just like the folder they'll be getting from every other firm they're considering.)

You are not marketing you or the firm. You are marketing your solution to your client's problem. And that solution isn't you. It is the legal work that you do.

Stop talking about how great you are, where you went to law school, law review, and some article you wrote.

Start talking about your client's problems, and your solution to their problem.

The client has come to you because they have a problem. They do not want a history lesson. They want a solution. Show them that you have the answers. If you practice family law, talk about family law. If your practice is focused on trusts & estates, talk about wills and trusts and probate court. Just focus on their problem.

6. Set and manage client expectations.

Most customer service issues develop because attorneys fail to set proper client expectations. Clients come into the office thinking about how they are going to spend that multi-million dollar insurance pay-out. Unfortunately, their case may only merit a few thousand dollars. It is up to you to tell them the truth.

As the legal expert, you know the law, the legal process, the timing, and the likelihood of success. That's why the client is paying you. Be honest about how long matters will take, how much they cost, and their likelihood of success.

Also, set expectations about how often they will hear from you and how fast you will return an email or phone call. Let them know what you charge for or don't charge for (i.e., phone calls, emails, postage, travel expenses, etc.)

Tell the client what you expect them to do on this matter. For example, they may have to be a witness or be deposed. They may need to provide you with documents, affidavits, receipts, photos or video, etc.

7. Use words your client will understand.

Research shows that the average person understands most things at around a 4th grade level. When you write copy for your firm's website, when you are speaking to a client, ask yourself: Can a 10 year old understand what I am saying?

Do not use lawyer jargon. You would not want your doctor using Latin terms like *streptococcal pharyngitis* or *nasopharyngitis* to diagnose your illness, when "you have strep throat" or "you have a cold" will do. Stop using fancy words or acronyms your clients probably don't understand when simpler ones will work.

Use "client" jargon. Talk about what you do in the same terms that your clients use. Most likely your clients have never used the term "domestic relations"

to describe their divorce. But a 10 year old knows what a divorce is. If they don't use it, you shouldn't use it either.

One more important point: No matter what words you use, do not assume that your client understands what you are talking about. Your client will sit in your office listening to you talk. He will nod his head while you are talking, as if he understands, but that does not mean he understands what you are saying. To avoid looking stupid, he won't ask questions or ask for clarification.

Ask your clients if they understand what you are saying. Walk them through it a few different times. Use visuals and concrete examples if possible.

8. Listen more than you talk.

You do not need to show your clients how smart you are. If you want them to trust you, you need to show them that you understand them. One way to do that is to listen to them.

Your clients want empathy. They want to be heard, to vent, to confess, to cry, to scream. **Actively listen.** Give your client your full attention.

Eliminate distractions when you are with your client. Do not bring your cell phone into client meetings. Only have electronic devices at meetings **IF** they help the conversation. If the meeting is in your office, shut off your computer or turn off the volume on alerts.

If you have been practicing long enough, and you have a great intake process, you probably have already heard what they are going to say. You also know how to respond to their questions. You know what advice to give them.

Let them have their time to talk, acknowledge what you heard, and then advise them.

9. Offer your clients a beverage.

Hot tip to Lee Rosen, a North Carolina divorce attorney, who writes a great law practice management blog called Divorce Discourse, for this idea. (Don't let the blog's name fool you. It has nothing to do with domestic relations.)

If someone were coming to your home to have a difficult conversation with you, would you offer them a drink? Of course you would. It's the polite thing to do. So why do so many lawyers "forget" to offer their clients a beverage?

According to Attorney Rosen:

“Offer a beverage. It’s important. It’s something we do for practical as well as social reasons. People dehydrate, and they need fluid. Plus, it’s an important ritual. It builds trust. It makes people comfortable. It’s part of why people hire you (or don’t)...When you skip this step, you damage the relationship right from the start. Don’t let that happen.”

- <https://divorcediscourse.com/offer-drink-polite-thing/>

In another post, Attorney Rosen also talks about the importance of when and how coffee is offered to a client. A beverage should already be in the client’s hand **before** you sit down in your conference room to talk with the client. No one should interrupt a client meeting to deliver coffee (or for any other reason.)

“Of course, it’s not just coffee. Interruptions of any sort can affect the formation of a trusting relationship. Having someone pop in to alert you about a call, another client dropping by, a signature on something, your spouse needing you, or anything else is destructive.

Meetings with lawyers involve private, confidential, sensitive matters. They are a big, big deal to the client. Little things matter. Coffee matters...Trust is at stake, and it’s the little, seemingly insignificant pieces of the process that can build or undermine it.”

- <https://divorcediscourse.com/coffee-can-cost-client/>

10. Offer bonuses or extras.

Think about offering something that would make it easier for you and your client to work together.

- Checklists
- E-Books
- Use of a Tablet

Think about offering something that alleviates an obstacle someone might have to hiring you, or something that makes it easier for them to hire you.

- If your practice focuses on the elderly, make house calls;
- If your practice deals with people with young children, hire an in-firm babysitter;
- If your practice deals with busy professionals, offer night and Saturday hours.

Think about the little things you could do to brighten your client's day.

- Acknowledge a milestone
- Champagne after a real estate closing (or a divorce.)
- Call them a few months later to see how everything is going.

None of these things cost a lot of money, but they can leave a lasting impression on your clients. It's the little things that can tip the balance on whether you get a referral or not.

11. Call your clients.

Your clients want to hear from you, so call them. Calling your clients to update them, even when nothing has happened for a while, reassures them. It makes them feel like you're thinking about them.

Also call your clients a few months AFTER the matter has closed. See if they're happy with the service. See if they did that follow up work they were supposed to do. It shows you care!

12. Anticipate your clients other legal problems and offer them a solution.

What other legal problems could your client be facing? How can you help them fix those problems? Whether you can do the other legal work or you can refer it to another attorney, help your clients identify their other legal needs.

For instance, a person in the middle of a divorce might also need some estate planning or real estate help.

A business owner might come to you with employment law issues, but they may also need assistance with commercial real estate matters, protecting their intellectual property, drafting business agreements, etc.

Always look for ways to upsell your services, the services of another lawyer in your firm, or another great attorney.

13. Never speak negatively about your clients or other lawyers.

This one is pretty self-explanatory, but needs to be mentioned. Negative talk will get around. Speak ill of another attorney, and you could find yourself in an awkward situation the next time you bump into them in the courthouse or at a bar event. They are certainly not going to refer business your way.

If you want referrals and repeat business, live by the old adage: **if you don't have anything nice to say, don't say anything at all.**

14. Never talk about your client matters in public.

This is another one that should be self-explanatory, but I see this happen all the time. The loud lawyer in Starbucks or on the train going on and on about his client's legal problems within ear shot of a dozen other people.

In our mobile friendly world, a lot of business gets done outside of the office. You see people working away on their laptops in restaurants, at the park, in coffee shops, in the library, etc. Just about anywhere people can find a Wi-Fi connection, you will see people hard at work.

Do not have a privileged attorney-client conversation at Starbucks. Do not talk about a client matter during your morning commute on the train. If the general public can hear your conversation, it is not an appropriate place to discuss your client's legal matter.

15. Embrace client feedback.

The only way to improve your law practice is to know what your clients think about their experience working with your firm, so you need to ask them.

What information are you looking for? You are looking to uncover the only metric that really matters.

There's a concept used by many businesses to benchmark their customer's satisfaction called the Net Promoter Score. Asking one question, the business is looking to identify where their customers fall into three groups – Promoters, Detractors, and Passives.

That question is:

“On a scale of 0 to 10, how likely are you to recommend this company’s product or service to a friend or colleague?”

Promoters are the customers most likely to recommend you, with a score of 9 or 10. Detractors are not your biggest fans, with scores of 6 or lower. Passives, at 7 or 8, are satisfied but are also likely to switch to a competitor under the right circumstances.

If your clients won’t refer you business, you need to know it, and you need to fix it.

16. Invest in a remarkable website.

If you have never done it, search your practice area on Google and really look at your competition. Can you tell the attorneys or the firms apart?

Lawyer websites are a sea of sameness. Same colors, same fonts, same pictures. It’s rare to find one that stands out from the crowd. It’s as if there’s one master website that every law firm copied.

This is what your potential clients think when they see this: *The attorney looks like every other attorney, so they must be just like every other attorney, so one is as good as any other because I can’t tell them apart. I guess I’ll pick the cheapest one.*

Your website is not an on-line brochure. It’s not where potential clients go to get your phone number so they can call your office and schedule an appointment. It’s where they go to get information about the legal problem they are having. If you don’t provide that information, they will move on.

Give your clients what they are looking for on your website.

17. Invest in social media.

The purpose of using social media is not to find clients.

Let me repeat that. The purpose of using social media is not to find clients. If you go on social media with the expectation of getting a bunch of new clients, you will be disappointed.

So why should you be on Facebook, Twitter, Instagram, etc.?

Social media helps you build connections between you and your referral sources. It is a form of networking. It gives you access to people you otherwise would never meet. It is also a great way to stay in touch with people. When used properly, social media provides an opportunity to build increasingly strong relationships.

As Attorney Lee Rosen says,

“With social media, the networking goal is to build connections. It’s an easy way to stay connected and take the relationship to an even deeper level. Think of it as a way to continue the conversation after you leave lunch.”

Here’s an interesting example. An intellectual property attorney who focuses her practice on artists has a beautiful Instagram account showcasing her photography. She’s not looking for clients on Instagram but she can leverage that account. When a potential artist client searches for an IP attorney in her city, her website comes up as does her social media accounts. The artist can see her photography, and they’re likely to give her a call because they know she understands them better than the average IP attorney.

18. Invest in blogging.

What should you blog about? **Start blogging about your client’s problems, and your solution to their problem.** If you educate your prospects and answer their most frequently asked questions, they will call you. Why? Because you’ve most likely given them help that no other lawyer has.

How long will it take? Blogging takes time. How much depends on how often you publish a post. You should blog consistently whether you post once a month, once a week, or every day. Please note the more you blog the better the results.

If you’re thinking about blogging, here are the benefits.

- a. You are recognized as a thought-leader in your practice area.
- b. You increase traffic to your site.
- c. You demonstrate your value and helpfulness to prospective clients.
- d. It’s something clients can tell their friends about.

19. Invest in your firm's systems and processes.

Having uniform systems and processes in your law firm is important. Consistency of process ensures things get done right time after time after time. And getting things done right makes your clients happy, and happy clients...well you know, refer business.

Create an office manual with detailed instructions on how every single routine task in your office is done. Your firm should have a process for the following:

- Client intake;
- Conflicts checks;
- Setting up physical files;
- Scanning documents and organizing "paperless" files;
- Inputting data into your case management system;
- Docketing;
- Processing the mail,
- Getting client's coffee,
- Billing,
- Client satisfaction surveys,
- Hiring and HR;
- Etc.

If all heck breaks loose because your assistant goes on vacation, you need to set up systems and processes. If an associate quits and you have trouble taking over his cases, you need a better system.

Bottom-line: If it can be systematized or processed, do it.

20. Invest in technology.

Invest in technology that make your systems and processes work better. Invest in technology that helps you run a better law firm.

If you want your new systems and processes to deliver the results your hoping for then you need to invest in technology. The opposite is true as well. If you want your technology to work you need to invest in the systems and processes.

It's a symbiotic relationship. If there's a problem in the process, no piece of technology will solve that problem. For instance, if your attorneys aren't logging their time correctly, even the most sophisticated billing program won't fix this problem in your time entry process.

Conclusion

Why should your firm invest in your client's happiness?

- **Because happy clients will do business with you again and they will refer their friends, colleagues, and family to you.**
- **Because it might be your best competitive advantage.**
- **Because you can.**
- **Because it's the right thing to do.**

Resources

Blogs:

www.sethgodin.com

www.darrendaily.com

www.success.com

www.divorcediscourse.com

Books:

To Sell is Human by Dan Pink

Delivering Happiness by Tony Hsieh

Purple Cow by Seth Godin