Are Lawyers Listening And Leading?

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A client-centric focus for a firm will never steer the firm wrong. A lawyer-centric focus may. Deference to the firm's lawyers who may be opposed to leadership or the business development chief about visiting "their clients" will hurt the overall firm and its chances of retaining and growing important clients. Whether or not to meet with clients on a regular basis will now significantly impact a firm's success. And this means all inactive important clients of the firm, not just the firm's current active clients.

To make the time to hear back from them about the upcoming goals and plans and any feedback about their relationship with the firm not only stimulates the relationship between the firm and the client; it also energizes those who speak with the clients to do more of these meetings. Enter the practice leaders and their new and evolving roles.

Practice leaders, department chairs and office heads all play an important role in the firm's leadership. To expand their roles slightly and add business development and client retention to their overall job responsibilities will provide new leadership opportunities for them and the potential for the firm to drive its client-centric culture.

Each partner in the practice will be wise to meet with his/her important clients at the end or beginning of each year to conduct a year-end audit. See our year-end questionnaire provided with this article. Adding this responsibility to the partners' business plans and to the practice chairs' goals (on which they need to report to firm leadership) will help the firm to realize greater revenue and for the clients to have a voice in how the relationship is managed and provide valuable insight into their own goals and operations. This insight will then help the partners to anticipate clients' legal needs and therefore provide an opportunity to align with the client.

Another key practice leader role to this end is to craft a revenue forecast. Each partner will need to provide information about which clients they are working with and what the anticipated revenue will be from that client for each quarter of the year as well as which prospective clients and thus forecasted revenue opportunities from them.

Nothing will happen unless someone picks up the phone, initiates a meeting and is talking with the client. To know how well the firm is doing on this front, have the partners take this simple quiz below and summarize the results and report back. Developing a client-centric culture starts with knowing how well the firm is already doing in this area from an internal and an external perspective.

Quiz Yourselves

Law firms can benefit from a more comprehensive approach to hearing the voice of the client. Firms should ask themselves: 1) Can we gather client feedback on a continuous basis? 2) Do we track the voice of the client across multiple channels, such as formal feedback interviews, research from third-party sources, meetings, ad hoc conversations, etc.? 3) Do we understand the full set of factors that the client uses to evaluate our performance? 4) Do we have visibility into the clients' strategic plans? 5) Can we analyze what our clients are doing — that is, their behavior — as well as what they are saying? 6) Is customer feedback managed centrally and made available across the firm? 7) Does our research allow us to "get out in front" of the client and lead forward-looking conversations about the client's business? 8) Can we work smoothly across practice and departmental silos to understand and serve clients effectively? 9) Can we develop research quickly to help clients understand emerging events that will affect their business? 10) Do we have a person or team responsible for making sure feedback from each key client is addressed by the firm?

Year-End Review and Planning Meeting Tips

We are fast approaching an opportune time of year for checking in with both clients and prospective clients (November and December, specifically). Consider scheduling meetings to discuss one and/or all of the following:

- Year-End Review (an update or recap of important matters worked on during the year);
- A Client Service Interview (formal or informal client satisfaction and service commitment review); and
- Annual Planning Session (discuss business plans, initiatives and aspirations for the upcoming year).

This proactive approach achieves the "top-of-mind" mindshare that we seek … and also affords us the ability to be viewed as a trusted business adviser.

Client Service questions to consider: 1) How would you describe the relationship with us? 2) What would you consider the most important elements of a professional relationship? 3) Are there specific areas in which we could improve? 4) How would you describe the quality of our work? 5) Regarding value, how do we compare to other law firms? 6) Would you suggest any changes?

Upcoming year planning questions to consider: 1) What are your top three priorities this year? 2) Can you describe your goals and objectives for the coming year? 3) What potential challenges does the company face? 4) Where do you see the business going in one, three or five years? 5) What are the critical company initiatives for the upcoming year? 6) What growth opportunities do you foresee in the future? 7) What are the greatest challenges you're facing in the legal dept.? 8) What's currently working in the legal dept.? What's not? 9) How do you see using outside counsel to help you achieve your goals? 10) What criteria are used for selecting outside counsel? 11) What areas provide the greatest opportunities for improvement?

Always close with a recap of the meeting and next steps based upon your understanding of the client's needs. Schedule a time to follow up (including dates and times).