



## Client Service: An Indispensable Skill for Future Leaders and a Value Added for Firms and Their Clients

*Marni Becker-Avin*

In the legal industry, getting clients can be difficult. Keeping them should not be. All lawyers at reputable firms are trained to provide excellent legal services; however, very few are trained to give excellent client service.

### The Need for Excellent Client Service

Client service can be defined as having knowledgeable people available to help with issues and/or answer questions when the client needs them. Every consumer-oriented business in America, with the exception of law firms, has a client service department, a place where clients can go to get issues resolved in an expeditious manner. In fact, many of the most profitable companies are those that go beyond offering a client service department and take service a step further. For example, Disney, Ritz, Apple, and TD Bank require their employees to get lengthy client service training so that the customers can have the best experience possible. These companies make that expenditure because they understand the value of impeccable

client service. They want their clients to keep coming back. They want clients to view their client service as an integral part of their product.

It is time for professional service firms to start thinking like big business. If we continue to compete on price, we go down the self-defeating road of accelerating commoditization. The only proven way to gain a sustainable competitive advantage in our current environment is by making clients our top priority. There will always be someone who offers the “product” for less, especially in a market where the product is increasingly treated as a commodity. Many clients perceive that they can walk to the firm down the street and receive the same work product.

One of the best ways for our firms to achieve differentiation and retain clients, especially in this economy, is by providing excellent client service. Attorneys, however, do not consider either sales or hand holding to be part of their job description. There must therefore be a fundamental and radical shift

in the basic beliefs of the profession as a whole.

We are in a service industry. Yet many in the profession do not understand that client service is an integral part of the “product” and that clients will pay for superior client service because it is a value-added proposition. One of the most recurrent traits among the most successful attorneys is their almost fanatical commitment to client service. They excel by communicating incessantly with clients, making themselves available, and responding in a timely manner.

## How Does Client Service Differentiate?

How do I know that cultivating the client relationship helps firms retain clients? At my firm, we have established a dedicated client service department, and our clients adore it. Recognizing that the number one complaint clients have about their attorneys is a perceived lack of communication or responsiveness and a feeling of being out of the loop, we apply the same concept to client service that we do to the client pitch, and it works: *Don't talk. Listen. Ask questions.* Clients do not appreciate feeling as if they are being “talked to,” and that is not the way to enhance the relationship. What clients do appreciate is someone who is interested in their business; who asks them questions about their business and/or interests; and who, especially, listens to their answers.

Our client service staff is trained in communication. When a client calls up complaining about a bill, for example, there is usually an underlying reason; and it is usually communication based. The client service team is trained to get the clients talking about the *real* reason they object to the bill. This provides the firm with an opportunity to salvage the income because, once the underlying issue is resolved, clients are understandably more amenable to paying their bills.

As an added bonus, clients are happy to have made a contact within the firm they feel they can turn to any time they have a question or concern. Clients who've called feeling initially upset about an issue are completely calm and satisfied that the problem will be resolved in a timely manner by the time they hang up the phone. Of course, it doesn't hurt that our staff remembers their names, asks about their children, and at all times communicates with a smile.

Clients see the service team as an extension of the firm and also as a neutral third party; therefore, the client feels more comfortable and less intimidated speaking with them. Our client service technicians are trained to know more about the firm than most other people in it, to follow up with clients to make sure they were satisfied with the resolution, and to communicate professionally and pleasantly. Providing a safe place for clients to call if they have an issue provides the firm an opportunity to fix concerns before they evolve into big problems.

While responding to and tracking client complaints (by type, by lawyer, by practice group, by office) is important, we take it a step further. Along with computerized analysis of incoming requests, we annually reach out to at least 20 clients served by each attorney to find out how we, as a firm, are doing for that client. We understand that client service is the ultimate competitive advantage: The service center creates loyalty among clients and, therefore, helps with client retention.

In addition to stopping potential problems in their tracks, developing client loyalty and retention, and expanding client relations, offering exceptional client service also has other crucial benefits. A client service initiative can help avoid a host of problems a firm may not have considered, such as, for example, curtailing receivable problems; the dismissal of professional complaints, whether administrative or otherwise; an

extremely positive impact on malpractice premiums; and the opportunity to discover, monitor, and evaluate employee performance issues.

To paraphrase the law business guru, David Maister, we are fortunate that we have to compete only against other law firms.

## **Client Service Training Is Part of an Attorney's Professional Development**

Clients want expertise from the practitioners they hire, so continual training is an absolute. This training in client service and communication must be a function and focus of Professional Development.

We have a three-tiered program, B&P University, which focuses on various skill sets, both substantive and procedural. We offer courses, mandatory for our attorneys, in substantive legal areas, leadership skills, client service, and communication. In addition to reading materials and a quiz during orientation, our annual client-service-related courses include, but are not limited to:

- Deflecting Not Defending
- Dealing with Diverse Clients
- Dealing with Difficult Clients
- Super-Pleasing the Client
- Communication and Skype Etiquette
- Getting Feedback and Acting on It

We also bring in speakers from nationally recognized client-service oriented companies, such as Disney and Ritz; we bring in clients, usually general counsel of client companies, to sit on a panel and discuss service issues before all our lawyers; and we simulate client phone calls and/or mock client meetings. Training should be a year-round initiative, not a three-day course and then back to business as usual after the program.

Neither client service nor communication comes naturally to attorneys; yet, if they want to survive and thrive in this economy,

they have to be able to do both with less arrogance and more compassion. While some people are lucky enough to understand the importance of client service and also instinctively know how to model the appropriate behavior, most in our profession must be consistently and constantly trained. Accordingly, an employee incentive program is extremely important as well.

Firms tend to measure success in terms of productivity, and they may balk at the cost expenditure of developing such a client-centered program. We must realize that the initial investment will be repaid ten-fold in the long run by the sheer numbers of new matters, paid accounts receivables, and client retention. Client service should be viewed as an exceptional investment rather than a non-billable activity because it is valuable, and it will generate a high return.

Firms also tend to compensate based (almost exclusively) on personal productivity (hours billed and collections) and the number of originations, because those are perceived to be the only things measurable. With our proactive outreach and client surveys, we have shown that client service can be measured and made an important factor in compensation decisions.

## **Is Client Service Trainable?**

This brings us to the elephant in the room, which is whether or not lawyers can be trained to provide better client service. Is it possible to teach attorneys, many of whom have personalities that mitigate their ability to adapt to client service, to be client service oriented? The lawyer in me is compelled to say something that most clients can't stand to hear: It depends.

It depends because it comes from the top. Many attorneys will not "get it" of their own accord and will have to be led there. Leadership has to walk the walk. Period. If the firm's management makes client service

a priority and if the top brass believe in it to their core, then it becomes an important reality. Decision-makers have to define it, model the behavior, and reward it. Leadership has to develop a system to measure an attorney's contribution to the firm based on constant client feedback and hold the attorneys accountable based on that feedback.

If the basic expectation is excellent client service above all else, if it is embedded in the culture of the firm, and if attorneys are held accountable, then the answer is an unqualified yes, lawyers can be trained to provide excellent client service. Along the same lines, if the attorney, in his/her own right, is a visionary, a leader, and grasps the crucial connection between client retention and exemplary service, there, too, the answer is yes, excellent client service can be a learned behavior.

Old dogs resist but are not immune to learning new tricks. Particularly at the levels below equity partner, lawyers are beginning to recognize that these skills are essential to advancement, so they welcome and seek out this training. The challenge is that lawyers reach a comfort level with their practice that is very difficult to achieve in a leadership role. Seeking out a leadership role requires a lawyer to stretch his/her boundaries and depart from his/her comfort zone. Likewise, it requires an extraordinary commitment to the institution, and a belief in the old adage "you are never too old to learn something new."

While there are some "born leaders," most leadership skills, such as client service and communication, can be learned; and firms are, more and more, teaching and encouraging the development of these skills among their partners. Firms are developing more leadership-focused training programs, where the objective is succession planning. Investing in such programs, and preparing the next generation of leaders to take over the helm, underscores that the

future is important to the firm — and that clients are essential to that future.

Leadership has always been important for the success of any business enterprise, but within the past several years lawyers have finally come to understand that a law firm is a business enterprise facing a rapidly evolving change in the model and in the business environment. Competition has become fierce, many practices have rapidly commoditized, and efficiencies are essential. Lawyers, historically resistant to change, need strong leadership to achieve stability and growth.

Leadership is even more important in this economy because firms without effective leadership are held together by money and, when times are tough, are not held together by anything. Effective leadership creates an atmosphere that promotes loyalty and camaraderie. A firm that has effective leadership that believes in making client service a top priority is more likely to withstand the pressures of fiscal challenges.

## **Client Service Is About the Client**

All clients say the number one quality they appreciate in a lawyer is that he or she "understands my business" and "listens to me." If clients are sophisticated, they may expect more technical advice and may know and understand the work required and time involved; whereas, if the client is unsophisticated, the attorney will need to communicate in layman's terms and discuss what the retainer entails and how much time is involved. Attorneys can be so focused on billing and originating that they tend to overlook the impact of alienating clients. In the past, there was a logical reason for this, a product of lawyers' logical minds: Billing was all that could be measured, while service was ephemeral. However, we can now measure service and should do so.

In this era of digital communications, it should not be difficult to keep in touch with clients. This may be a double-edged sword because clients have come to expect faster responses. The old way of doctors and lawyers keeping clients waiting will no longer be tolerated. It shows a lack of respect for the client and does not make the client feel special or important. "If you build it, they will come." If you serve well, they will stay. The way lawyers interact with clients is the most important aspect of the relationship, even more important than the work product or winning the case. Lawyers must do more than understand this; they must live it.

Does this suggest that the client is always right? Of course not. Yet the client *is* always right. Like it or not, the client's perception is our reality. Some attorneys may resent having to spend any non-billable time on a client, disregarding the theory that, if they cultivate the relationship, they will inevitably make more money. There are those in our profession who have uttered words such as "Let them leave. We are better off without them." In this author's humble opinion, that ignores a very basic principle. We need

clients, or we would not have jobs. The fact remains that, in the current business environment, we are rarely if ever "better off" without a client.



**Marni Becker-Avin** is a Florida barred Attorney with a Masters in Mental Health Counseling. She practiced as a Trial Consultant for many years before being named Professional Development Director at her Firm. As PDD she is responsible for all of the Firm's recruiting, University and training initiatives, CLE,

leadership programs, evaluation process, diversity scholarships, and the client service department. (Becker & Poliakoff is the first firm in Florida and possibly the country that has a department solely dedicated to client service.) She is also a member of the Professional Development Consortium.

Reprinted with permission from **PD QUARTERLY**. The author of this article is permitted to reproduce and distribute it without limitation, including republication elsewhere with credit to *PD Quarterly*.

Copyright © 2012 Evelyn Gaye Mara. Address subscriptions and correspondence to Professional Development Services, 66 River's End Drive, Seaford, DE 19973, (302) 249-6229, [maraeg@profdev.com](mailto:maraeg@profdev.com).