Client Relationship Management

Finding and Minding the Right Clients

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Whoever said the client is always right has clearly never worked in a law firm.

Raving Fans

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Raving Fans

Ken Blanchard, Jon Driver, and Sheppard Bowen
Your clients are only satisfied because their expectations are so low and because no one else is doing better. Just having satisfied clients isn’t good enough anymore. If you really want a booming business, you have to create raving fans. “

- “Raving Fans” - by Ken Blanchard & Sheldon Bowles

Who are your clients?

Can you Identify Current GREAT Clients?

- Getting buy in from others
- A group workshop?
- Changing the way you think about clients has to be a “team sport”
What Makes a Good Client for YOU?

- Easily communicates needs (and wants)
- Has reasonable timing expectations
- Is accessible
- Understands the value of your work
- Pays on time
- Respects your time
- Understands they are not your only client
- Has high integrity
- Wants a long term relationship
- Lets the attorney be the attorney
- Realistic budget
- Takes advice
- Participates in the process
- Communicates openly with you
- Understands that magic wands and crystal balls were not handed out in law school

Identifying Right Clients

- From the beginning?

HOUSTON
WE
HAVE A
PROBLEM

Create a Culture of Client Service
Micromanage the Client Experience

How?

- Manage Expectation
- Anticipate Needs
- Understand Them
- Over Communicate
- Leverage Technology
- Are the clients bad because we make them that way?

How can the client experience be improved at YOUR firm?
Attracting the Right Client

Differentiate.

BE Bold
BE Creative
BE Innovative
BE Outstanding
BE Remarkable
Boring Stuff is Invisible

Relationships Matter

Benefits of Happy Clients – or Raving Fans
- More work from existing clients
- More work from referrals
- Happier employees
- Decreased stress
- Improved profitability
- Firm growth/expansion
Client Rating Systems

Who is Pareto
- Why do I care?

Absolutely Fantastic
- Refer others
- Responsive
- Pay their bill
- Value your advice
- Long term commitment
Better than a C…

- Has some of the same characteristics as an A
- But needs some help getting all the way there
- Bs are not necessarily BAD.
- (Secret Client Rehab)

Counterrevolutionary…

- Common
- Average
- Most firms have a lot of these
- Goal: Get them to B

Disaster

- Move.
- On.
- No seriously, MOVE ON.
What if you CANNOT move on?

Client Retention
- Are you monitoring your client retention rate?
- Costs % more to get a new one than to keep an existing one
- #1 Reason? Attitude and Indifference

Client Satisfaction
- The KEY to client retention
- % clients will not tell you they are dissatisfied...they just leave
- Building personal relationships
- The ones who left? Ask them why...
- Identify areas of business growth
Surveys and Interviews

- Survey your clients
- In person interviews with clients
- Capture and analyze results
- ACT on the feedback
- USE the feedback – internally and externally

What to ask?

- Why did you choose our firm?
- What aspects of your experience have been most satisfying?
- Give me at least 1 thing we could have done better (NOT a question)
- What services would you like to see our firm provide?
- Would you recommend us?

Say THANK YOU
Cross Selling

It is cheaper, more effective and more efficient to build relationships that are deep and wide with existing clients. - Deborah Roth Grabein

Strategies

- Offensive – get more work from those you KNOW need more work – and invest the time in your best clients so you KNOW what they need
- Defensive – make sure you are serving your clients in a way that ensures they are not going to be poached by other firms

2 Words.

Trusted Advisor
Client Ownership

Sometimes our biggest problems are internal problems

Identify Early

- Be Proactive
- Have a way to track potential opportunities early
- Make the introductions when you can – however you can

Education

- Don’t be afraid to give things away – TELL people what you know.
- How can you entice current clients to learn more about your firm?
How to Amp Up Cross Selling

- Identify the internal challenges/obstacles
- Make a list of the low hanging fruit (estate planning clients that own a business)
- Build the INTERNAL relationships (Estate Planning Lawyer with the Business Lawyer)
- Where can you make opportunities?

Firing a Client

You’re Fired!

…it is always our desire to have a mutually beneficial relationship with our clients. When that cannot happen, we find ourselves in the unfortunate position…
Who Needs to GO?

- The “yeller”
- The one that does not pay
- The one that does not respect your time
- The scope increases, with the expectation that the budget does not
- The one who continually ignores your recommendations

Wrapping Up...

- The client is NOT always right – but that does not really matter.
- Identify your ideal client
- Micromanage the client experience
- Differentiate
- Rate your clients
- Ask them how you are doing
- Fire someone

BE Bold
BE Creative
BE Innovative
BE Outstanding
BE Remarkable
Put DOWN the Pen

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#30 Relationships
- That’s what it is all about
- Relationship Marketing
  - Way of Life

#29 – Define Your Target Market
- Demographics
- Mindset
- Core Values
- Philosophy
- Culture
#28 Target Your Market

- Speak TO your client in your marketing
- Go where they go
- Write where they read

#27 Measure

- Who referred you?
- Track it in a database
  - Even better if you can report revenue by it!
- Especially where you spend MONEY!
- If it isn’t working, stop doing it.

I know half my advertising budget is being wasted, if only I knew which half.
#26 Plan Follow Ups with Prospectives

- Initial consultation – decide...do you want them or not
- Craft a plan to follow up
- Don’t forget...other people are marketing too!

#25 Teach them...

- The baby lawyers...they need help
- They don’t just KNOW how to market
- Marketing mentoring...

#24 Event Planning

- Help them with mingling...
  - What is your connection to this event?
  - Tell me about the organizations you are involved with?
  - What keeps you busy outside of work?
  - What do you attribute your success to?
  - Mary Ellen Sullivan
#23 Keeping in Touch

- Calendar a follow-up at an appropriate time
- Happy clients = referrals

#22 FAST Staff Feedback

- Frequent
- Accurate
- Specific
- Timely

#21 Linked In

- Help your Lawyers. Keyword load their title. Do not use (as much) discretion. Connect with people.
#20 – LIVE Client Service

- Don’t just SAY it

#19 The Receptionist.

- If it is time for an upgrade, upgrade.

#18 Event Pictures

- Community Involvement is Good Marketing
- Post photos on your website
- Have a “firm gives back” day
#17 Video Marketing
- It is a REAL thing!!
- Use it for...
  - Bios
  - Introductions
  - Success Stories
  - Problems You Solve
- Read this: http://abovethelaw.com/2015/07/5-ways-to-use-video-to-grow-your-law-firm/

#16 CLE Speaking
- Let those that are learning know that you are the BEST
- Educate – share your knowledge.
- Nothing can compare or compete with your YEARS of experience

#15 Become a Natural Marketer
- Speak powerfully and authentically about how you help people
- Build relationships with people – not just for the purpose of referrals
#14 The Marketing Habit
- Relationship Marketing is a habit
- Practice it often!

#13 Communicate Often
- Have a communication policy at your office
- Don’t let X number of days go by without reaching out to your client

#12 Seek Client Feedback
- Ask regularly
  - How are we doing
  - Anything we can do to improve
- But –if you get good feedback, be prepared to address it.
**#11 Gift Cards**

- Employees Love Gift Cards
- Little things do matter
- Keep a stash in your drawer

**#10 Use Practice Management Software**

- No one should ever have to retell their story
- You should not have to ask the client something you should already know
- Readily Available Case Information

**#9 Claim Avvo Profiles**

- And fill them out!
- Keep them up to date!
#8 Personally Thank Referral Sources
- No substitute
- No voice mail
- No email

#7 Front of Yours – Front of Theirs
- Front of mind awareness
- Keep your clients and past clients in mind
- Articles, newsletters, books, etc
- Keep personalized post-its on your desk (4x6, name at the top)

#6 Offer to be a SME
- Local News
- Radio
- Plant, Water, Sow
5 Stop Sending Holiday Cards

- Maybe Thanksgiving Cards
- Maybe New Year Cards
- OR...
- Consider taking what you would have spent—time and money—and adopting a family or landscaping a park

4 Know Your Clients

- Learn something new about them as often as possible
- People like to do business with people they like

3 Never Eat Alone

- OK, maybe not NEVER
- Buy the book
#2 Know your Competition
- And LEARN from them.

#1 Don’t Get Complacent
- Marketing and Business Development need to happen all the time – whether you are slow, or busy

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Thank you!

QUESTIONS?

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