

Improving Client Satisfaction Improves Your Practice and Your Life

By Jim Calloway, Director, OBA Management Assistance Program

Lawyers spend their professional lives serving their clients.

But client service today means more than just accomplishing the required legal work for which the lawyer was retained.

A very important aspect about running a law practice today (right after competency to do the work well and doing so) is providing superior client service to produce satisfied clients. These clients will then return if more legal services are needed in the future and may well serve as a source of referrals for new clients.

One thing that the recession should have driven home to members of the legal profession is that solo and small firm lawyers have one thing in common with lawyers at the very large firms. If you don't have clients — your own clients — your future is uncertain. When large law firms had to lay off lawyers and make difficult decisions, there were likely many brilliant and accomplished lawyers who lost their employment. When there were layoffs, certainly the lawyers who were unlikely to get terminated were the lawyers whose clients brought in

a lot of revenue to the firm and those who likely would have taken a lot of well-paying clients with them upon leaving the firm. In fact, some firms saw those lawyers leaving for greener pastures.

And we all understand that the small firm lawyer who does not have sufficient paying clients may soon no longer have a law practice at all.

Today's economic environment has focused the attention of many businesses on basic business concepts. It is certainly an appropriate time for lawyers to refocus on ways to improve client satisfaction in an increasingly competitive legal marketplace.

We have created systems in law offices to make sure that deadlines are properly calendared, documents are proofed carefully, witnesses are subpoenaed in a timely manner before trial and legal projects are generally managed. Lawyers are generally good at keeping up with their legal projects, even if that often means working a fair number of nights and weekends to meet deadlines.

For future success, lawyers should examine the systems and processes that they have

in place to assure client satisfaction with the firm's services. We live in a very service-oriented society, and it is important to deliver good service in response to client inquiries and timely communication practices generally. Other industries call this customer service, and even though we have clients instead of customers, good customer service practices are critical.

For example, we all hear the warning that failure to return client phone calls is the number one complaint that is made about lawyers to others. Sometimes the failure to return phone calls may signal other problems. It is difficult to return the call when the matter the client is calling about is past the deadline for completion.

But often the failure to return phone calls is one of those "not enough hours in the day" problems — an emergency on another client's matter, a court hearing that takes much longer than anticipated, a wreck in front of the lawyer that slows traffic or any number of things that impact the lawyer's schedule.

So if we know the delayed phone call return issue can make clients unhappy, can the lawyer develop a system to deal with this and head off problems in advance? Today's lawyer will look at expectations, policies and systems.

EXPECTATIONS, POLICIES AND SYSTEMS

The lawyer will want to establish appropriate client expectations beginning in the initial interview process with the new client. Let them know that you believe in good service and intend to deliver that to them. But also explain that your work has busy periods and sometimes returning phone calls quickly is challenging. Many clients have no idea what it is like to get 30 or 40 phone messages during a day. Let them know this is sometimes challenging for busy lawyers. If there is a legal assistant assigned to their matter, this may be a good time to introduce them and explain that part of the legal assistant's job is to help with client communications. If you want the client to communicate with staff, you need to encourage the client to do so.

Then let the client know your policy on returning phone calls.

So hopefully, the client will have the expectation that your policy is to return phone calls within 48 hours or by the close of the next business day. But the client will hopefully also have some understanding that sometimes this is one of your real business challenges.

A business policy is a rule for how the business is run. Make certain your staff understands your return call policy. Policies should be in writing and kept in the office

policies and procedures manual. In a well-run office, this manual will be referred to frequently and regularly updated. Hopefully, the majority of calls will be returned with the stated policy time frame.

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By taking the time to make clear that this is an important office policy, your staff will know if the policy is to return calls within 48 hours.

A system or procedure helps us implement the policy. Staff knows this is important and if you get delayed at court, it is their duty to jump in and return the calls from the day before even if they can only let the client know that there's been an unexpected delay and it may be tomor-

row before they hear from you. A part of that system may be that someone checks every day at 4 p.m. to see the status of returned calls. Another part of that system may be that the lawyer is careful to note in the practice management system that he or she has returned the call. Another part may be that the lawyer has to be gently reminded near the end of the day of his or her policy if there are unreturned calls.

Often a frustration for the lawyer in returning those phone calls is that the client has simple questions that the staff could have handled like "I just wanted to confirm my court date." So another part of the system is that staff should try and get the reason for the call and not just the phone number. A good response is "She's not available now. Can I take a message or is there anything we can help you with?" The specific response would vary between a solo lawyer with one staff person and a large law firm with a busy full-time receptionist, but the attitude of customer service should not.

Ultimately all of this would be contained in the office policy and procedures manual. This is an example of how the line between policies and procedures becomes blurred. It makes little sense to have both a policy and a procedure in the manual on returning client phone calls. Rather, there would be a page or two that might be summarized as, "Our policy is to return all client phone calls within 48 hours and here is how we do it."

Some readers may be thinking, "Instead of investing all of that time and effort in policies and documents on returning

client calls, I'd be better off actually returning calls or doing other billable work." But this is one step along the path to superior client service. It will actually save time when a new staff person is hired. And, as noted previously, it deals with what is said to be one of the greatest customer service problems about lawyer firms.

The process of managing expectations, setting policies and implementing systems will serve you well in many client service areas.

When you have completed this step and are ready for another one, your attention is directed to "Form Letters You and Your Clients Will Love," which was originally published in the *Oklahoma Bar Journal* way back in March 7, 1998, 69 OBJ 802 at tinyurl.com/26jv5a.

Lawyers are trained to focus on the client's legal issues in a narrow and objective way. This is a part of our training and a good thing.

But, as has been written in this column before, it is the client's perception that will result in either future referrals or unhappiness. It is some-

times hard to recognize and appreciate that the skill of a lawyer or even an outstanding result may not weigh as heavily in a client's positive or negative perception as other matters. The tone of the receptionist's voice, the amount of time left on hold, the promptness of returned phone calls, the appearance of an attorney's office, or whether copies of pleadings and correspondence are mailed to the client; all of these factors may contribute more to your client's attitude than the matters we are trained to consider important.

Try to set realistic deadlines for completion of projects. But when a deadline cannot be met, make sure the client is informed of the delay as soon as possible.

GETTING FEEDBACK

Another way to improve client satisfaction is to ask your clients (and former clients) how you are doing. Taking good clients to lunch periodically is a good informal way to do this.

Another tool for gathering feedback is the client survey. The client survey can also be an excellent training tool in

the law office, whether it is a small or large firm. If your office staff members all know that clients are going to be receiving a survey, they may govern their behavior in order to get high marks from the clients. Thus, you serve an in-house training function with the survey as well.

As far as the effect on the clients of receiving a survey, most people are pleased when they are asked for their opinion. Hopefully, this will give the clients a final positive time to reflect both on the good services that they received from your firm and upon how nice it was that you asked them their opinion.

Be sure and give space for clients to write their comments and suggestions. Including stamped pre-addressed reply envelopes will increase your response rate. You may be surprised at the amount of input and feedback that you receive.

CONCLUSION

Most lawyers are very good at client service. But striving for improvements in client services and satisfaction is a good business practice for every lawyer.