





Service with a Smile and Much More

Legal administrators can play key roles in ensuring their law firms' attorneys and staffs master the essentials of client relationship management.

BY CHERI TERZIAN

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Client relationship management (CRM) is more than a set of processes or systems. It's about the relationships that lawyers and staff have with clients. True CRM requires a whole-office approach to create and maintain client satisfaction. The crucial factor in successful CRM is the team. From the receptionist and billing clerk to the legal administrator and senior partner, the team must promote quality, timely, friendly and professional customer service.

You have only one chance to make a first impression. Encourage all front-line staff to display smiles and friendly, professional attitudes. Build the foundation for exceptional customer service as a core value of your firm's operations. Employees will then know how to handle diverse situations that may arise.

Beginning with your receptionist – who often has the first opportunity to create that vital first impression – here are only a few ideas that can make a big difference with clients.

SHORTCUT

Legal professionals who understand the essentials of client relationship management (CRM) are vital to law firms' success. Effective communications, use of technology and process management are among the many integral elements of successful CRM.

- Give your receptionist a nameplate to create a personal touch.
- Instruct your receptionist to review the appointment calendar periodically so he or she can easily address clients by name.
- Train your receptionist to welcome arriving clients and, after seating them, offer water or sodas.
- Ensure that the firm's lobby area is tidy and orderly.
- Provide each new client with an intake form so all relevant information may be captured accurately.
- Train all staff to answer their telephones within three rings. (Research indicates that by the fourth ring, a customer's blood pressure actually begins to rise.)
- If children frequently visit your law office, provide coloring books and crayons to keep them occupied while their parents conduct business. Parents and staff will appreciate it!

THE IMPORTANCE OF TRAINING

Ideally, the employees you've hired to serve on the front line have the right personalities to fit the positions. With additional training, they can hone their skills and generate innovative ideas for providing exceptional customer service.

You can emphasize the need for continually improving service by creating a section devoted to CRM in your law firm's newsletter. You can also provide ongoing training on CRM through mentoring, training videos, audiotapes and CD-ROMs, or by retaining an outside consultant for your attorneys and staff. Training programs also help to improve the team's ability to work together, and thus create a strong internal employee environment. Several organizations provide training seminars in all administrative areas, including customer service:

- American Management Association: www.amanet.org/seminars/index.cfm
- Fred Pryor Seminars/CareerTrack: www.pryor.com/index_Body.asp
- SkillPath: www.skillpath.com
- Padgett Thompson: www.nationalseminarstraining.com/Index.cfm

Create incentives to encourage and reward exceptional client service and implement a system that monitors staff accomplishments in this area. If a client identifies a member of the staff who provided special service, award an hour or two off (at no charge to personal time), a movie pass or gift certificate as incentive to continue providing exceptional customer service. Rewarded performance creates satisfied employees, and satisfied employees are more likely to generate satisfied clients. Incentives also strengthen employee retention and commitment to the firm and its growth.

ATTORNEYS' CRM OBLIGATIONS

Leading and training attorneys may prove more challenging than training staff. After the receptionist greets and seats a client, it's the attorney's responsibility to further the CRM mission. Educate the managing partners about the importance of attorney training in CRM. Create an attorney policy and procedural manual – separate from that given to support staff – to provide a clear picture of the law firm's culture and expectations regarding client service. Here are some ideas that legal professionals can use to reinforce attorneys' CRM obligations.

- Institute a policy that clients will not be left waiting once your receptionist has seated them. If an attorney is delayed, the attorney's assistant or the receptionist should explain the reason for the delay. Clients will be more sympathetic and less frustrated if they are kept informed.
- Urge attorneys to return telephone calls and e-mail messages within a designated time frame (four to six hours whenever possible). Jim Calloway of the Oklahoma Bar Association says that the most common client complaint involves lawyers failing to return phone calls.
- Make it clear that it is the attorney's responsibility to know the client. Attorneys should be required to obtain information from the client at the initial consultation that includes the client's preferred method of contact, as well as an assessment of

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the client's needs. Add that information to the firm's CRM database.

- Develop key-client teams that focus on the needs of the firm's most important clients. The client should be introduced to all key players involved with the client's matter, including the legal administrator.
- Develop an action plan for handling the client's work and communicate the plan to the client

and staff involved in the matter. Review the plan periodically to ensure it is being implemented and amend it as necessary.

- Encourage a value-added approach through which attorneys learn about their clients' businesses, expectations and trends affecting their businesses and legal problems.
- Encourage attorneys to prepare themselves for client meetings with more than a refresher of the case history, but also a specific review of personal information – anniversaries, new business opening, child off to college, etc.
- Send thank-you notes for referrals.
- Make services more convenient for clients. For instance, make house calls to elderly clients.
- Send clients articles of interest and those related to their business even when there are no specific occasions to contact them. Clients will appreciate the firm's sharing the knowledge, and attorneys will have new contact with the clients.



ENHANCED RESPONSIVENESS

Clients want and need to be kept informed. Studies by the American Bar Association and numerous state bars have consistently shown that most disgruntled clients are not upset about the quality of legal services rendered by their attorneys. Rather, clients are angered by the attorneys' lack of simple communication etiquette.

A legal assistant or administrator can play an important role in communicating to the client when an attorney is unavailable. Encourage attorneys to authorize their assistants to communicate with clients on their behalf in their absence and to instruct them about how and when to respond. Work to ensure that the assistant is properly trained to handle client communication and confidentiality and refrains from conveying legal advice during client conversations.

PROACTIVE COMMUNICATIONS

Teach attorneys and staff to proactively communicate regularly with clients to keep them informed about updates on their cases and to show them the value of their legal investments. An added benefit: Frequent communications may also encourage clients to pay more promptly and without issue, as they will have been kept informed as their matters have progressed.

Always remember, of course, that quality is crucial in CRM communications. Imagine what a client would think if the client received a document containing errors or misspelled words. Stress the importance of not only spell-checking work, but

also proofreading it in its final form, for both printed documents and e-mail messages.

TECHNOLOGICAL TOOLS

Technology can play an essential role in making client follow-ups effortless. For technology to be useful, all deadlines associated with a matter must be recorded immediately and routinely on your office calendaring system. If your law firm has case or client management software, include relevant notes on all communications to help everyone involved in the matter stay informed.

CRM software typically consists of a database containing detailed client information that attorneys and staff can reference across the firm. This technology enables the CRM team (staff and attorneys) to share critical marketing and client service information and provides the team with a comprehensive view of the clients in a central location. Data usually include contact information, billing history and personal or business information related to the client. Some technology also integrates client management with case management in one software system, providing a more complete CRM package.

Integration is a key factor to the success or failure of CRM implementation. Determine whether the software being considered integrates smoothly with the firm's existing applications, including accounting, calendaring and handheld devices.

Perhaps the biggest challenge to implementing CRM software is persuading people to use it. Make sure to communicate with and educate the team before introducing any new system. If a client-focused culture has been nurtured, introducing software to enhance the process should be met with pleasure.

ESSENTIAL BILLING STRATEGIES

The client engagement agreement is an essential outline of the services the

Use this sample survey as a tool for your own research as part of a broader client relationship management process.

Client Survey

We appreciate the opportunity to serve your legal needs. Please help us improve the quality of our service by completing this survey and returning it to our firm. Your response will be kept confidential.

1. Please rate our firm in the following areas:

	EXCELLENT	GOOD	POOR
Quality of Legal Advice			
Promptness of Service			
Friendliness of Staff			
Amount of Time Devoted to You			
Handling of Telephone Inquiries			
Information on Invoices			
Fairness of Fees			
Office Location and Furnishings			
Computers, Telephones and Office Equipment			

Along with the service(s) currently provided to you by our firm, what other legal needs do you have? _____

How can our firm improve its services to you? _____

If you use other firms besides ours, how do our services compare? _____

What compliments or criticisms do you have about individual lawyers or members of our staff? _____

May we call you to discuss your comments and inform you of additional services available from our firm? _____

Additional Comments: _____

Please provide your name, address and telephone contact information.

Thank you for selecting us as your legal team.

When discussing a complaint, let the client do the talking. Be open-minded and listen without initially looking for the cause. Remember that the goal is to arrive at an agreeable resolution.

Once the client explains the background of the problem and you have an understanding of the issues, confer with the primary attorneys to discuss their views. Only then can you and the attorneys craft a solution to the problem and create strategies to avoid recurrences. The keys to any conflict resolution are maintaining a professional, courteous demeanor – no matter how intense the conversation may become – and handling client relationships with diplomacy and tact.

CONDUCTING CLIENT SURVEYS

Information from client surveys can be critical in evaluating and redefining your firm's CRM goals and system. Questions should be crafted to obtain feedback about the clients' satisfaction or dissatisfaction with the attorneys and staff who served them, the level of responsiveness, the value of work performed, the need for additional services, the need for greater cost or quality control, the need for greater lawyer specialization, whether they would use the firm again and whether they would refer the firm to friends and associates. (See the sidebar on page 30 for a sample survey questionnaire.)

The most important consideration in conducting client surveys is actually using the information. With insight from a survey, you can identify client expectations and focus on addressing the firm's shortcomings. Establish a committee that compiles clients' responses and prepares recommendations for improving delivery of legal services. Review the findings with the firm's principals and implement strategies for improving the firm's weaknesses.

CRM: A CORNERSTONE FOR YOUR FIRM

The administrator's role in client relationship management extends from training personnel to implementing appropriate technology. No matter which hat the administrator wears, it is essential to realize that CRM is the cornerstone of maintaining existing clients and cultivating new ones. ✱

about the author

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LEARN MORE

ALA Resources

These titles are available through ALA's Web site, www.alanet.org/education/mrc/index.asp.

- *By the Seat of Your Pants: The No-Nonsense Business Management Guide*, by Tom Gegax and Phil Bolsta
- *Clients for Life: How Great Professionals Develop Breakthrough Relationships*, by Jagdish Sheth and Andrew Sobel
- *Client at the Core: Marketing and Managing Today's Professional Services Firm*, by August Aquila and Bruce Marcus
- *Communication Skills for Leaders*, by Bert Decker
- *Marketing the Legal Mind: Turning New Perspectives into Powerful Opportunities*, by Henry Dahut, Esq.

The following articles are available in the *ALA Management Encyclopedia (ALAME)*, www.alanet.org/alame.

- "The Administrator's Role in Client Relationship Management"
- "A Strategic Approach to Crisis Management and Media Relations"
- "Personal Business Plan Development: Creating Something Worth Selling ... And a Story Worth Telling"

The following are accessible via ALA's Legal Management Resource Center, <http://thesource.alanet.org>.

- "What Will the Business of Law be Like for Midsize Firms in the Next Five Years?" by Joel A. Rose – Type in keywords "**client relations management**" in the search engine
- "Teach Your Associates Well: Developing a Business and Management Skills Curriculum for Law Firm Associates," by Stephen R. Chitwood and Anita F. Gottlieb – Type in keywords "**client relations management**" in the search engine
- "Surviving in the PR Agency Game," by The Marcus Letter – Type in keywords "**client relations management**" in the search engine

On the Web

- Chief Information Officers (CIO), "Enterprise CRM" – www.cio.com/enterprise/crm/index.html
- CRM Today – www.crm2day.com
- Six Sigma, "Customer Relationship Management Best Practices" – www.isixsigma.com/bp/crm/

On the Shelf

The following titles are available for purchase or download through many online retailers, including www.amazon.com.

- *Customer Relationship Management*, by Francis Buttle
- *The CRM Handbook: A Business Guide to Customer Relationship Management*, by Jill Dyché
- *Customer Relationship Management: Getting It Right!*, by Judith W. Kincaid