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Fine-Tuning the Client Experience at Your Firm

By Christopher Earley

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Your most unhappy customers are your greatest source of learning. —Bill Gates

I believe the single and greatest way to grow a law firm is to provide exemplary customer service. Being sensitive to and constantly taking the pulse of what our clients think about the quality of our customer service is low-hanging fruit that, when tended to, can result in massive, compounding gains for a law firm. Referrals from clients, five-star reviews, and a happy work environment are just some of the many benefits that result when providing and constantly improving your law firm's level of client service.

But all too often, law firms neglect this vital concept. They take clients for granted and sometimes can be tone-deaf on what frustrates clients during their journey with a law firm. When this happens, a nefarious metastasizing unfolds: Clients get upset, the workplace becomes stressed and unhappy, and growth stalls.

As lawyers, we are first and foremost in the customer service business, and everything at a law firm must therefore revolve around that. All else is secondary. This is a critically important mindset to adopt because it informs the strategies that are designed to put the clients' needs first.

I believe in checkpoints during each client journey, where we mine information from our clients on how we are doing in their eyes. Here are some easy and free ways to ensure your clients receive great service and become raving fans for life.

Client Surveys

Our firm sends out two automated email surveys to each client during the duration of each case. I am always hunting for problems and holes in our service, and surveys reveal areas we need to focus on and fix immediately. Surveys also reveal things our clients enjoy about their experience with us, so we make sure to double down on those things.

This requires no effort or time on the part of our staff because our CRM (customer relationship management system) does all the work for us. I find that a small number of clients actually respond to the surveys, but the ones who do respond provide great information we can act on. I want to hear about areas where we are falling short so we can continually optimize and improve our clients' experience with us.

Automated Emails

In addition to the surveys we send out, we also send out automated emails to clients every two months asking if the clients have recently been contacted by our office. This ensures that client contact remains regular and consistent throughout the case. This is extremely comforting to the clients, reduces the need for them to call into the office, and has helped us improve the client experience.

The automated contacts have multiple benefits because my team members know these emails are going out, and that incentives them to make sure they are regularly contacting and updating clients on case status. Additionally, the emails show clients that I care about and take very seriously our desire to always keep them updated and informed on where their case stands. Similar to the surveys, this is a quality control tactic we employ to always monitor and improve the clients' experience—and it's all automated.

The Personal Touch

At the end of each case, when clients come to the office to pick up their settlement check (at this stage we always give them a merchandise bag with free items), I ask them how we did. I sit down with clients and ask if they can suggest ways we can improve the delivery of our services. I use a checklist so I don't forget to ask anything of the client.

I find clients really appreciate this because it shows them once again that we care about and value their feedback. If the client is happy, I ask what they liked about their experience and if there is anything they can suggest we improve. I make sure to remind the client that we are built on client referrals and would love to help the client's family and friends in the future if they need us. If the client is unhappy, I make sure to learn exactly why because this creates a great opportunity to improve our services.

Continual Improvement

The ongoing process of fine-tuning and improving the client experience requires continual focus and intention. The more information you can extract from clients about their case journey with your office, the more you can improve the experience for current and future clients.

You'll never know what clients like and dislike about your firm unless you ask them—and ask them frequently.

If you have other ideas on how the client experience can be gauged and improved, I would love to hear them. Please share them with me by emailing me at ccarley@chriscarley.com.

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Authors

Christopher Earley

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Christopher Earley (www.chrisearley.com) is an author, entrepreneur, and personal injury attorney serving clients throughout Massachusetts.