This Month:

- **Client experience and satisfaction**
  - **On boarding**
  - **Communication**
- **Business Development Basic Reminders**

The right communication by law firms with potential clients has been but still is a massive challenge not just for on boarding but also retention, image and referrals. Plus there are increasing demands for information and communication throughout the life of the file. Plus there is an increasing expectation from clients to be kept aware of changing circumstances and their law firms knowledge of consequences.

Back in 2017 the Law Society Gazette published "70% of survey respondents unhappy with the quality of new business enquiries to their firm"

This was despite the original **"Survey Report For Lawyers On Converting Telephone Enquiries Into Profitable Business"** prepared by Ian Cooper in September 2013 which became an inspiration to me along with a **"MCM Mystery Shopper Customer Experience – Law Firms"** published in January 2013 by Liz McMichael.

My article back in June 2018 [June2018.pdf (professionalchoiceconsultancy.com)] was a very simple summary of some potential quick returns from fundamental business development and communications. Above all like most required activities it needs full buy in from the management team and accepted responsibilities and accountabilities for the good of the practice from all. Bit of a summary here [CNWLS_2022.pdf (professionalchoiceconsultancy.com)]

Onboarding

On boarding is very important and does require a commitment from all in the firm. Simple statistics that I have used before are

A 100 person law firm doing the regular marketing activities may generate 500 inbound enquiries a month. With limited preparation and attitude a 20% conversion can be expected – however doing the job properly can turn that into 65%. So 100 or 325 new files a month which at £500 per file equates to an **additional £1.3 million revenue a year for a 100 person law firm**

It does vary by work-type

The PMS/CMS systems can be utilised but can also be augmented with added value aids such as www.perfectportal.co.uk and tested and measured and coached by www.insight6.com.

Review of performance should be part of the monthly Operations Board agenda with monthly trended data of enquiries generated, source of enquiries, conversion rates by source and this should be for every work-type.

This can be further augmented by a new solution utilising AI www.matrix247.com/omnichannel that provides detailed data on communication performance from multiple media sources for the firm covering not only new enquiries but also complaints and praise. Staff handling the communication can also have all means located on one screen – happier staff can mean happier clients. Management can also see profitability by department and/or media channel and the return on marketing spend.

In March 2022 www.insight6.com published a blog that demonstrated 6 things that every law firm can do to improve customer experience (CX) and increase the bottom line. This is based upon significant exploration

- Make sure all staff give their names to callers and the same when transfers to the expert (60% not offering a name)
- Test messaging service – 43% of messages left did not get a response
- Be empathetic with a distressed caller
- Make sure technology is working – more than 30% web enquiries not answered
- Follow up – very small - 8% - follow up a lead. 38% requested information didn't arrive
- Make it personal – only 53% e-mails personalised. 57% with grammatical errors

In September in the North West Matrix and Insight6 are offering 3 events on Conversion performance https://bit.ly/3zpU1fT

Client Communication/Experience

Client experience is critical. From memory a satisfied client will only tell between one and five others – an unhappy client can tell in excess of twenty people who will pass on, admittedly with diminishing number bit could reach five hundred.

There has also been an interesting article in July 2022 by Sue-Ella Prodonovich in Australia that highlights that in some cases **"why partners do not like client feedback".** This in fact applies to all staff because the feedback can be used internally as a punishment rather than education and motivation.

- Client feedback needs to be part of the agreed processes and accountabilities with
- Initial data sought from good relationship clients rather than nasty ones.
- Positive feedback should be looked at first so that it can be replicated.
- The surveys should also be open questions rather than box ticking and scores and
- If the image is one of the feed-back being a commitment to listen it will get more support internally.

Clients really do expect more communication throughout a case. Not only with on boarding but also being kept up to date with what is happening and what is going to happen next and when. This is not just down to the lawyer handling the file but to everyone who answers the telephone or receives the client or meets the client at the door. Names and smiles are critical – it is that great word **empathy**. Culturally critical for all. Nobody wants to hear – the lawyer did a good job on my Will but I am not going back to them again – the receptionist (or another lawyer) was extremely rude and uncaring.

Auditing and measurement of performance and coaching from organisations like www.questforexcellence.uk

It is very important that case management systems are used effectively by all. Making full use of SLA's on case files – as well as the necessary culture of responsiveness to clients when receiving a query. Most CMS systems will enable a communication with a client to save the handling of inbound calls and e-mails by being proactive. This kind of thing can again be augmented with added value third party products such as www.in-case.co.uk that interfaces with the case management products and sends communication to the clients automatically. More client satisfaction and experience and less work handling the inbound stuff.

There are also some interesting artificial intelligence companies in the sector that can provide links with the increasing number of added value solutions in demand such as www.optsm.co.uk and www.enabl-ai.com

As well as new business enquiry generation and conversion – client satisfaction issues need also to be on the agenda for monthly Operations Board review. All complaints and congratulations by department or individual need to be recorded and reviewed with a positive mentality to enhance the culture, empathy, business process and efficiency

Few Business Development Reminders

Without question there has to be a business strategy bought into by the management but also sold to all staff with their accountabilities and roles clear.

With the state of the World at the moment it may not be that easy to predict the future so the 3 or 5 year strategy needs to be under constant review with monthly trends and perpetual forecasting and business decisions made in a monthly basis within the framework. The necessary flexibility has to be built into the structure – the right and available skills, not to over resource, the utilisation of part time and outsourced skills a resource.

Responsibility for business development needs applies to everyone in the business dependent upon their roles whether the boss, head of department, BD manager, secretary, reception

Clarity of the strategy is fundamental to BD

- Current work-type development
- Geographical development
- Potential client profiles and segmentation
- Mergers or collaborative working
- Networking – expanding relations with formal and informal referrers

Where is the work coming from and route to market plan for each

- Client retention
- Client Development – more services and gap analysis and actions
- New business

Main tasks

- Firm's Image – PR, advertising, web site, collateral, track record and performance, collaboration, referrals, networking
- Awareness of the market and potential clients – PR, advertising, web site, social media, newsletters and mailshots, exhibitions, conferences, events, collaboration, referrals, networking, cross selling
- Accessibility to clients and prospects – web site, responsive receptionists, telephony, e-mail, responsive departmental staff

Tools for action

- Plans – overall, individual mini plans by work-type/location
- PMS and or CRM tool to be segmented – existing and new opportunities
- Continuous monitoring and milestones to modify activity as required
- Training and business process for all activities

- Culture
- Bids, tenders, response

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