



WHITE PAPER

# HOW TO BE THE PARTNER YOUR CLIENTS WANT

How Streamlining Your Law Firm's Workflow Can  
Improve Client Service



THOMSON REUTERS®

**“There was no communication, and I think he was too busy ... I was a minor thing for him. So, I would not go back. For anything.”**

This simple, yet frank, response from a real law firm client is a sign of the power shift in the market, giving clients greater freedom regarding where they turn to solve their legal problems.

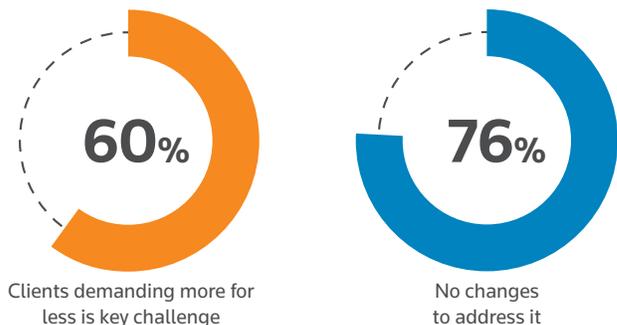
Attorneys have undoubtedly recognized this shift, but, according to Thomson Reuters research, the majority aren't doing anything to respond to it. It's a widening chasm for attorneys between what they know is a challenge in delivering the best customer experience and the actions they're taking to deal with it.

The numbers prove it. Nearly 60 percent of respondents confide that clients demanding more for less is a key challenge, yet 76 percent admit they have made no changes to address it. Firms also agree the primary measure of success is client satisfaction ratings, but only 37 percent of those firms say they track client satisfaction. These findings come from the [Thomson Reuters Legal Executive Institute's 2019 State of U.S. Small Law Firms Report](#), a study of more than 300 law firm respondents practicing in a wide range of areas.

And the story gets bleaker when it comes to firms confronting all the challenges they face: 27 percent of respondents revealed that their firms had

made zero changes in the past two years. Why? Complacency and the comfort of the status quo—two long-standing issues for the profession.

#### A Gap at Firms



But the risk of inaction outweighs any possible risks associated with making changes to meet client demands. Ignoring client service is especially hazardous, because it leaves attorneys unprepared for sustainable growth and puts them further out of touch with a client's needs. When it comes to client

service, a short-term mindset means long-term loss of business and increased pressure to make ends meet.

The good news is that a path forward awaits with plenty of opportunity to create a competitive advantage while giving clients the service they expect. In fact, the changes made now to track and enhance client service offer a powerful “first mover” advantage, since such actions are likely not being taken by competitors. This white paper will analyze the issue of client service for firms, show how clients are changing and offer guidance on what firms should do.

## A SAVVIER AND MORE DEMANDING CLIENT

Today’s clients are more sophisticated than ever, largely because they have access to a virtually limitless amount of information about their legal issues: legal problem guides, how-to blogs and even DIY services, to name a few. In turn, that knowledge increases the number of options available to clients, and the level of client expectations continues to rise. An attorney can now expect a much different first meeting with a client where the client is versed on his or her issue and more apt to demand a certain outcome.

However, that research may not necessarily be equipping clients with the proper information—which leads to other challenges. Claudia Lagos, a criminal defense attorney and partner at [Scully & Lagos](#) in the Boston area, is seeing these changes. For her, a big hurdle is the self-perceived expertise clients have when they come into her office: “You constantly

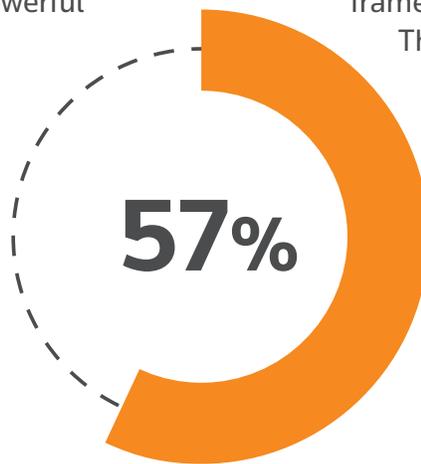
have to deal with a lot of self-anointed lawyers on the internet. It’s definitely a tougher thing for dealing with clients and their ultimate satisfaction.”

In addition, the online world has created heightened demands for speed. Legal consumers today expect immediate value and give attorneys a short time frame to respond. According to the 2018 Thomson Reuters U.S. Consumer Legal Needs Survey, 57 percent of respondents who chose to act on their legal need did so in a week or less. That’s a quick turnaround to give clients the information they need, respond to their requests and get them to make a hiring decision.

The need for speed holds true for existing clients. “The most important thing is that I’m available,” Lagos says. “I think the most common complaint that you hear is that they haven’t been able to get a hold of their attorney.”

Compounding matters is the fact that 81 percent of legal consumers contact or seriously consider just two attorneys or law firms per legal need, according to the 2018 Thomson Reuters U.S. Consumer Legal Needs Survey. In other words, they are doing their homework online to learn more about their legal options and narrow down who they will contact. Because of that, a firm’s client service process starts before a client ever signs on the dotted line. The first interaction with an attorney’s online and offline reputation makes first impressions that much more important.

At the same time, though billable hours are shrinking, that doesn’t mean the work is decreasing. In fact, it’s just the opposite. For those firms surveyed, 72 percent identified spending too much time on administrative tasks as a challenge. As



Customers who took action in a week or less

billable hours decrease, work is increasing that pulls attorneys away from clients. It shows that law firms have come to grips with the issue but haven't identified the necessary solutions to fix it.

Because of all these changes, the client service process now encompasses more of an attorney's mindshare and time. It's still about providing excellent legal expertise and giving clients a clear and accurate perspective on a case, but it's also about responding to calls, texts and emails, managing lofty expectations and showing how the firm is evolving with technology.

## A TEPID RESPONSE

The issue of client satisfaction is weighty, and most law firms are paralyzed by how to address it. While 85 percent of those surveyed said client satisfaction rates define success and 25 percent considered it the No. 1 measure of success for their firms, attorneys aren't tracking client sentiment, and the majority aren't seeing improvement in satisfaction ratings.

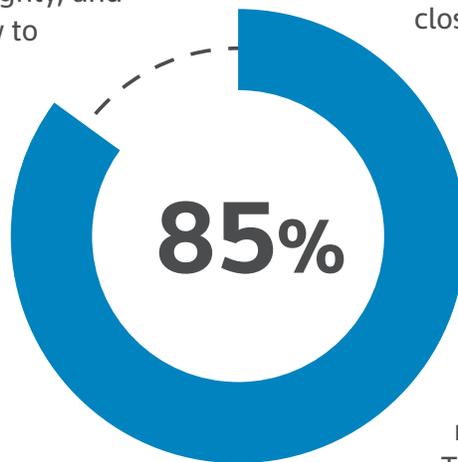
The struggles are evident when half of those surveyed said they haven't determined how to address the issue of clients demanding more for less, often known as rate pressure. On top of that, only 35 percent of respondents noted providing better service to their current clients was a goal for 2019.

With the myriad challenges facing a law firm, attorneys are struggling to react to an underlying problem that is showing outward symptoms. Of

course, it's easier to focus on a tangible bottom line than it is to look at the emotions surrounding a client's happiness. However, ignorance isn't bliss.

Law firms know a lack of action surrounding client satisfaction exists, but other metrics can seem more definitive and are much easier to track. While a metric like revenue must be measured, ignoring a formalized process for tracking how clients feel is leaving a gap between how attorneys think clients view them and how they are actually perceived. The reality is an unsatisfied client base searching new avenues for legal expertise and representation and law firms that are content to lose their business.

But for those willing to make changes, the problem can be eased. And those who are already addressing the issue of client satisfaction continue to close the gap.



Attorneys who define success by client satisfaction rates

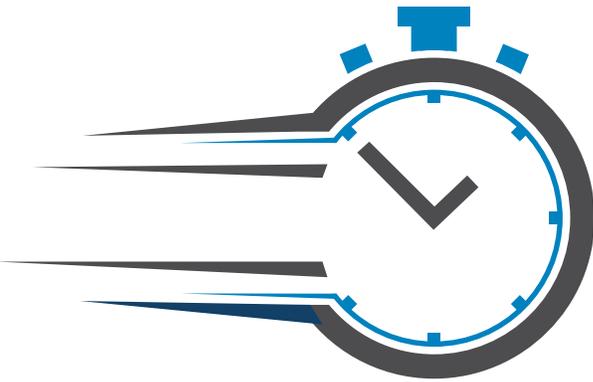
## THE PATH FORWARD

The number of issues can seem overwhelming, but if law firms can overcome their reluctance to establish a modern client service model, a more secure future awaits. To help make the switch and enact meaningful change, here are three recommendations to consider:

### Think Speed

Clients are in a hurry. They want a partner and a champion who can guide them through times of uncertainty. They want someone who will be there to answer their questions and be available when the need arises. It's a large part of how they measure the

value provided by their law firms. In a Thomson Reuters survey of 106 corporate general counsels and assistant general counsels, a full 50 percent of respondents said they moved work away from a firm due to lack of perceived value. In a separate survey of partners at law firms with at least 30 attorneys, only 18 percent of respondents thought value was an issue.



Showing value to a client can be achieved or lost through responsiveness and the ability to provide the quickest avenue to a solution. To do so, many firms need a culture shift to set expectations that all client questions get a response within 24 hours, even if it's a simple response that the question was seen and will get looked into. This ability to keep in contact with clients helps them feel heard and informed.

*“A good client experience is being available, and that you always keep them updated on the status of their work,” says Lagos.*

Related to responsiveness is the firm's ability to streamline tasks that interfere with client

accessibility. Current legal tech solutions help to streamline routine tasks and free you up to provide the personalized attention clients want. One example is having the ability to draft accurate documents while avoiding risk and doing it in less time. It allows you to provide a better-quality work product and deliver that higher level of service to each client. Law firms that commit themselves to responsiveness and client care can anticipate happier clients.

For NiaLena Caravasos, founder of the [Law Office of NiaLena Caravasos](#), investing in client relationships means surprising clients when it comes to responsiveness. “Sometimes when I respond right away, I don't hear back, and I'll have my paralegal call them to make sure that they saw my email, and they'll tell her, 'Oh, my gosh. I didn't even check my emails. I never thought she would respond to me so quickly.’”

## **Don't Treat Technology as a Foe**

Another way to heighten client experience is for firms to bring themselves into the modern age and drop their reluctance to embrace technology. That begins with looking past the short-term pain of any technology adoption and looking at the benefits—especially those your competitors get.

New technologies make it easier to become the responsive and knowledgeable partner clients want to hire. In the past, attorneys spent hours repurposing previously used documents, and manually proofing and editing them. But now you can automate document creation and avoid risk in the drafting process to heighten efficiency and increase confidence in your legal work. With expertise being the No. 1 factor legal consumers look for when hiring an attorney, that's a big deal.

Creating more efficiency through document automation and drafting technology can make you more accessible to clients and allow you to dedicate more time to the things that matter. Attorneys revealed that 26 percent of their time is spent on tasks outside of practicing the law and meeting with clients, including document proofing and formatting. That's lost revenue, lost relationship-building time and lost work/life balance.

“Part of technology is to be able to have the tools to make things easier for you,” says Caravasos. “If you don't take advantage of what technology offers for you, then things are going to slip through the cracks.”

## Ask Your Clients for Feedback

You miss 100 percent of the shots you don't take, as the saying goes. In the same way, it's hard to know if your clients are happy if you never ask. That's why it's important to create a system for tracking client satisfaction.

It need not start with a highly formalized system. Because very few law firms are tracking client service, this is a chance to get a step ahead. And it isn't just about individual attorneys. Each

lawyer should recognize that her or his reputation impacts the entire firm.

Consider these small steps:

- Ask clients directly for feedback via in-person comments or by email using their name and case specifics.
- Let the client know how the feedback will help the firm and even individual practice areas, and request information the client thinks will help others choose an attorney.
- Invest in quarterly surveys of current and past clients to get a pulse on how they feel.
- Manage the firm's online reputation by spending time looking at online reviews.

Each of these items by itself can make a difference in a firm's ability to understand client sentiment. Once the feedback process is set up, schedule regular meetings to discuss client input and systematically review the information. This feedback is invaluable as law firms look to better serve their clients' needs.

“I track client satisfaction basically because I talk to my clients pretty frequently,” says Rob Sullivan, a product liability attorney and founder of [Sullivan Law](#) in Kansas City.

Don't neglect the best facilitator for future clients: current clients. Asking clients for feedback builds trust and can be the bridge from one client to the next.



## THE OPPORTUNITY IS RIPE

All the data suggests that ignoring client satisfaction has hit a tipping point. When your livelihood depends on the service delivered, firms can't disregard the impending challenges. The modern client expects more. However, with the right strategies in place, law firms can overcome the challenges of the current legal market. Potential clients still need their problems solved, and attorneys still have the expertise to get the job done. The party setting the terms of engagement may have shifted, but with a renewed focus on positive client experiences, law firms can experience a boost to their reputations and their bottom lines.

And beyond revamping the ways you serve your prospects and clients, know that sometimes positive client experience just comes down to being more human and understanding of the issues they are facing.

“You have to be genuine,” Sullivan says about his service approach. “And it helps when your clients like you.”

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