

## 12 Steps to a Successful Client Interview Program

By Peter A. Johnson

As every good business developer knows, the majority of new business and referrals comes from existing clients; and law firms are increasing their commitment to meet with their clients. The goal of a client interview program is to garner information that will enhance a law firm's business-development and marketing efforts by gaining insights into client needs and objectives. This information is essential to gaining new business, while at the same time providing specific recommendations (from the eyes of the client) as to how the firm can ensure client retention and enhance the client relationship. Interviews provide data that can be used to determine and develop specific strategies related to client retention and business development.

Law firms need accurate information about how their clients evaluate existing and future legal needs, service

requirements, and how they assess the "value" provided by the firm and the attorneys with whom they work. Too often, firms and attorneys define the "value" they bring to the representation without regard to the client's frame of reference and there is often a great divide between the two definitions. By understanding what clients "like" and "dislike" in the relationship, a firm can develop information by which it can differentiate itself from its competition by addressing identified client needs as well as service and relationship issues.

Although each firm approaches client interviews differently, there are several similarities among the programs. The following is a detailed description of the various steps that must be taken to ensure a successful program regardless of whether the interviews are conducted by firm personnel or an outside consultant.

### PRELIMINARY CONSIDERATIONS

#### *Survey vs. Interview*

Although firms report some success from written and e-mail client surveys, in our experience, client meetings are a much more effective way to obtain meaningful information. Survey responses generally come from those who are either very satisfied or very dissatisfied. Often times the clients with the most relevant opinions do not respond. The data therefore, can be misleading. Your key clients should be offered more personal attention and commitment.

#### *Who Should Conduct the Interview?*

The interviews can be conducted by any one of the following:

- Outside Consultant;
- Marketing Director/CMO;
- Firm CEO/Executive Director;

- Managing Partner;
- Relationship Attorney;
- Practice Group Leader; or
- A combination of firm attorneys and/or administrative personnel.

Interviews conducted by firm personnel are less expensive and can be as effective as those conducted by an outside consultant. Many clients, however, have reported that they are more candid and forthcoming with an interviewer who is not directly involved in the relationship (an outside consultant). In either case, care must be given in choosing an interviewer who has the requisite skills and training.

#### *Phone vs. Face-to-Face*

Telephone interviews are less time consuming and less expensive but may not be as effective. A skilled interviewer often picks up on the subtleties of non-verbal cues that cannot be observed over the phone. A personal meeting allows increased focus and limits distractions. We find face-to-face interviews create the opportunity to establish rapport. Phone interviews are an alternative when/if the client insists on this method or if traveling makes the cost prohibitive. They may also be an appropriate choice when interviewing other than top tier clients.

### STEP 1: FORMING A CLIENT

#### INTERVIEW COMMITTEE

We recommend that the law firm establish an internal committee consisting of attorneys from several practice areas, as well as the firm marketing director and business development/client relations personnel. The committee will assist in identifying the clients to be interviewed and will monitor the interview schedule, process and follow-up. To the extent "buy in" of the program is necessary, having a

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committee with dedicated partners from different practice areas will assist in the buy in process.

### **STEP 2: IDENTIFYING THE CLIENTS TO BE INTERVIEWED**

In determining the clients to interview, criteria to be considered are:

- Clients with longstanding relationships;
- Top 10 revenue-producing clients;
- Perceived problems or threats;
- Change in client management/personnel;
- New clients;
- Decreased revenues;
- Cross selling opportunities; and
- Introduction of a new “relationship” attorney (eg, succession situations).

Institutional clients often have more than one contact, and firms must be cautious in deciding whom to approach regarding the meeting. In companies with larger legal departments, general counsel or chief attorneys should be consulted. We find that they do not often attend the meetings but appreciate being called. In one situation, a general counsel with whom the firm had little contact attended the meeting with the assistant who had the relationship. The GC was so impressed that the managing partner of the firm had made the investment to speak with the company that he gave additional work to the firm in a different practice area.

### **STEP 3: CONTACTING THE CLIENT**

Once the decision has been made to interview the client, the “relationship” attorney should call or write the client to advise them of the interview initiative and to obtain the client’s agreement to participate. We recommend that the attorneys call (or e-mail) the client contact and explain that, as part of the firm’s commitment to client satisfaction, it has asked a consultant to meet with several of the firm’s key clients, for no longer than 45 minutes, to discuss client service. Inform your client that the firm appreciates its participation and providing information that will assist the firm in enhancing the relationship and improving its representation. Inform the client of the name of the person who will call and conduct the interview. Although we recommend a call, a letter is also appropriate. The information contained in the letter can also be used in the phone call.

### **STEP 4: INTERVIEWER CONTACT WITH CLIENT**

Regardless of who ultimately meets with the client, that person should make the call to arrange the meeting. In addition to streamlining the scheduling process, it gives the interviewer the chance to start to build rapport and to prepare the client as to what will take place at the meeting. The interviewer can take the opportunity to:

- Introduce himself or herself (start to build rapport);
- Schedule the meeting and tell how long the meeting should last (45 minutes);
- Discuss who should attend from the client organization;
- If there are more than two contacts, we recommend separate meetings;
- Sometimes a corporate general counsel will want to attend even though he or she is not the primary contact;
- “Tee-Up” the discussion (ask client what topics he or she wants on the agenda); and
- Once a date is selected, advise the relationship attorney and the committee.

### **STEP 5: PREPARING FOR THE MEETING WITH THE CLIENT**

#### ***At least 2 weeks before the meeting***

Interviews are successful and informative when the interviewer invests time to understand the client relationship by conducting internal and external research. Clients appreciate a meeting where the interviewer is well informed and, therefore, asks few routine questions. Many times the attorneys or the committee will have specifics that they would like to have addressed. A sample list of questions is included in the sections that follow.

Prior to the interview we recommend the firm conduct the following internal research:

- How long has the firm been doing work for the client?
- What is the client’s business?
- How did the client come to the firm initially?
- Identify “key players” in the client’s organization.
- Who at the client makes the decisions about outside counsel?
- Are there other firms being used by the client? In what areas?
- Review billing history.
  - Revenues over the last 3-5 years.
  - Realization.

- Profitability.
- Write-offs.
- Billing/collection issues.
- Identify areas of practice client has used.
- Identify who has done work for the client.
- Research litigation in which client is involved.
- Nature of the claims.
- Who is representing the client?
- How would you define the level of satisfaction with the firm?
- Hold a “team meeting” of attorneys who have worked on the client’s matters.
  - Are there current or past performance issues (What was the outcome?)
  - Relationships (good, bad, potential).
  - Opportunities for new work and relationships.
- Research trends in the client’s business and industry.
- What trade organizations are important to this client?
- Are there areas to pursue or areas to stay away from?
- What is the personality of (describe) the person being interviewed?

#### ***One week prior to the meeting***

Immediately prior to the interview, we recommend researching the client by reviewing its Web site and “Googling” both the company and the contact with whom the meeting will be held. Look at the Web site to learn of recent events at the company. Read the current client press and news releases. In most situations, the interview is scheduled weeks after the initial contact, and there are often developments in the company, or with the contact, of which you should be aware. The law firm and the interviewer “look good” when they have invested the time to learn about any recent developments in the client’s business which may impact the company’s future legal needs.

### **STEP 6: CONDUCTING THE INTERVIEW**

#### ***What to wear***

What you wear creates the first impression. In preparing for the meeting learn whether the company is formal or casual and dress accordingly. Even if the company is extremely casual we recommend a sport jacket but no tie.

#### ***Arrive early***

We recommend arriving at least 15 minutes ahead of time, particularly if you have not visited the client before. There are benefits to an early arrival in addition

to the obvious one of not being late. We have found that reading the client's literature in the lobby can provide valuable insights. For example, we recently visited a client who conspicuously displayed their "Client Service Credo." We jotted down the 12 items and used their own materials as an outline for the interview. The client remarked that it was the first time a law firm had focused on *their* values. A connection was immediately established which led to a successful interview. On another occasion, we had the opportunity while waiting outside the general counsel's office to chat with his assistant. When she learned our purpose, she volunteered some insights about what the GC didn't like about working with some law firms. This was the first opportunity she had had to have this discussion and her unanticipated comments were extremely helpful.

#### ***Establishing rapport-making small talk, and getting to the interview***

Prior to the interview, you have learned about your contact (your research) and have a sense whether he/she is outgoing or reserved. If you have spoken with this individual to schedule the interview, you have made some initial impressions and, of course, have made some notes! In the event that you have only limited information you can take cues from the setting. Look around the office. How is it organized? Are the pencils lined up on the desk and papers neatly staked? Are there pictures of the family? What does the artwork say about the person? In order to get the most out of the interview, you need to establish a connection in order to gain the confidence of the client in just a few minutes. Using the information you have, engage in some initial "chit chat" by spending just a few minutes talking about sports, the weather, the artwork, the pictures of the family—just enough time to start to make a connection.

#### ***Transition to the Interview***

When you are establishing rapport (and enjoying it!), you may find it difficult to transition to the substance of the meeting, but you have limited time. We recommend that after a few minutes you say something like "I am enjoying our conversation and we could spend the whole day talking, and we wouldn't get to why I am here and I promised not to take more than a few minutes of your

time. I'd like to ask you some questions about the firm."

#### ***Always start off with the easy question — "What do you like about working with the firm?"***

The client is ready for this question and will invariably compliment one of the attorneys by saying something like, "I like working with John. He is extremely responsive and really understands our business. He gets things when I need them and seems to really care about me and my business." (Clients often say, "I don't really work with the firm, my relationship is with John. I don't know too many other people in the firm.") After you ask some of the follow up questions, the next question is one that they are not as quick to respond: "What *else* do you like about working with the firm?" That is when the true interview starts and your training as an interviewer becomes critical. They are not usually prepared to discuss what they like after talking about John and you must work to elicit that information. Through your research you know that the client has also worked with another partner, and you may mention, "What is your experience with working with Kathy?" You can change the questioning somewhat by asking what the firm does really well, the answer to which will provide information different than how John was described. Go on to probe for information and then move on to the other areas of inquiry.

#### **PROBING QUESTIONS —**

##### **OPEN-ENDED QUESTIONS**

Open-ended simple questions elicit the most information. We find that the following four questions are particularly effective as follow up questions:

1. What do you mean by that?
2. Can you tell me more about that?
3. Can you give me an example?
4. What else can you tell me about that?

##### ***The areas of inquiry***

A more detailed list is contained in the next section but the primary questions fall into five main categories:

1. What are we doing well? What *specifically* do you like about working with our lawyers?
2. What can the firm do to improve the relationship?
3. What are the business developments in the future or trends in the industry that may affect your need for legal services particularly, any you would

like us to anticipate or help you address?

4. How does the firm compare to other firms being used by the client? Best practices?
5. Is there anything that we have not covered that you would like to talk about or any other suggestions you would like to make?

You should familiarize yourself with all of the subcategories and be prepared to address those areas in follow up questions. You cannot expect to address all of the areas so do not rush to cover new topics until you have all the information on the current topic. The tendency is to move too quickly from topic to topic in an attempt to exhaust all areas; in doing so you risk losing important information. The most relevant and informative data is often found within the context of the answers to the follow-up questions.

#### **TIPS FOR THE INTERVIEWER**

##### ***Listen, Listen, and Listen some more!***

There is a correlation between a successful interview and how little the interviewer talks. Rapport, attitude and active listening are critical in developing a relationship that will elicit the most helpful information. The interviewer must listen more, talk less. To be successful in active listening, however, you must start with "intention." You must intend to listen. Active listening can lead to a most informative interview. Active listening can be as basic as restating back to the speaker what you believe he/she said or meant (for example: "In other words, you ..." or "If I understand you correctly, you want to ...," or, "So what you are saying is ..."). If you heard and understood them correctly, your confirmation will reinforce your connection and communication. If you misheard or misunderstood, you will get clarification and you will not make faulty assumptions.

##### ***Don't interrupt***

Not only is it impolite to interrupt the client, but you may also miss important information. Resist the temptation to fill the silence. Wait until the client has completed the answer. The last part of a response may be the most important part.

##### ***Don't be defensive***

When personnel from the law firm conduct the interview, they need to learn how to respond appropriately to

criticism. The tendency is to protect the firm and make excuses or provide rationale. One of most troubling interviews occurred when a practice group leader responded to a criticism about missing a deadline. This interviewer engaged the general counsel in a debate as to whose fault the missed deadline was. A better way of handling this criticism would have been to acknowledge the mistake but not attempt to lay blame. The interview should be an opportunity for communication, not a "who's right, who's wrong" session.

### **Do not sell!**

One of the goals of the interview is to increase revenues by enhancing the relationship, but the interview itself, is not the forum in which to attempt to obtain more business or cross sell other services of the firm. The interview should provide the opportunity to educate the client about other practice areas, but in a subtle way. The interview is to gather information about service and learn ways to improve the relationship. There is a tendency among law firm marketing personnel to look for opportunities to sell the firm's services during the interview. The focus should be on client service, not sales and marketing.

## **STEP 7: REPORTING RESULTS**

### **AFTER THE INTERVIEW**

#### ***Making the phone call to the relationship attorney***

After each interview we recommend that the interviewer call the relationship attorney to briefly discuss the meeting. Not surprisingly, most attorneys are very interested in what their clients have to say and some may even be anxious about the comments. A phone call immediately after the interview assuages that anxiety and most attorneys welcome the feedback. The client should be called by the relationship attorney to thank them for their participation.

#### ***Writing the report client-specific***

A written report of the interview should be prepared within a week of the meeting. Some firms limit the distribution

of the report, but we recommend that it be sent to the managing partner, the marketing director, the practice group leader and the client relationship attorney. The individual reports detail behaviors, issues and concerns relevant to a specific client and they also provide information necessary to make any appropriate changes to the services provided to that client.

### **Compilation — trends and themes**

Assuming that several client interviews are conducted, we recommend that the interviewer prepare an additional report that will not only outline recurring themes and trends, but will also provide specific recommendations. A trend analysis considers information across the entire client sample and typically reveals common themes including the firm's image, competition, specific strengths and weaknesses, price issues, use of technology, knowledge of firm capacities, etc. Trend analysis also provides data for making firm decisions based upon the collective information from a sample of different types of clients or within a specific type of client classification. Many firms make a presentation of this information to all of the attorneys and start to use the data to develop a client service plan.

## **STEP 8: MEETINGS WITH CLIENT**

### **TEAMS/DEVELOPING STRATEGIES**

After the report has been completed, the client team (those attorneys working on the client's matters) should meet to discuss the information provided. We recommend that the meeting also be attended by the person conducting the interview, as well as the marketing director. The objective of the meeting is to develop specific client service recommendations and strategies responsive to the report.

## **STEP 9: COMMUNICATING WITH THE CLIENT**

If you are not committed to address client concerns with the client, do not conduct the interview!

What you do with the information

from the interview is as important as the information itself. The firm needs to commit to contact (and preferably meet) the client to discuss the interview, the report and the recommendations made at the client team meeting. For example, if the client has complained about billing formats, the firm may be able to provide alternatives. Complaints of excessive fees require clarification of the fee structure.

## **STEP 10: PARTNER FEEDBACK**

As part of the evaluation of the client interview initiative, within a month of issuing the report, we ask the "responsible" attorney the following questions:

- In what way was the information generated by the client interview helpful to you?
- What if any comments did the client have regarding the interview?
- Are there any other areas of inquiry that would have been helpful? If so, what are they?
- Based on the interview, are you planning to alter the way you handle or supervise the work for this client?
- Are there any institutional changes you would recommend as a result of the interview?

## **STEP 11: ADDITIONAL FOLLOW UP**

We recommend that the interviewer follow up with the client 6-9 months after the interview to discuss the firm's response. The interviewer should then report that information to the relationship attorney and to the person or committee in charge of the client interview program.

## **STEP 12: START ANOTHER ROUND OF INTERVIEWS!**



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