

# Ask the Authorities

## THE QUESTION

Our client interview revealed that the company did not like working with one of our senior partners. I need to deal with this—any thoughts?

### Angeline Mistretta



First, understand exactly what the interview revealed, then quickly communicate that information to whomever can help address the issue. This could be your managing partner, the senior administrator, the relationship attorney, and/or you. In any event, the relationship attorney is crucial to this conversation.

This key group can decide if the problem partner is essential to the matter or if someone else can be brought in on the team. In some cases, that “senior partner” may be able to adjust his or her style and can continue to work on matters for this client. In other cases, it may be best to remove him or her from these matters. Regardless, it needs to be addressed quickly and discussed with those who have influence. Also, the senior partner must be given constructive feedback. He or she needs to hear this information as it might affect other client relationships in addition to this one.

Most importantly, the firm must respond in a timely fashion to the client. Be sure the relationship partner lets the client know that the feedback was heard, it is being addressed, and the plan for moving forward. If the client does not agree with your plan, modify it based on the client’s additional comments.

*Angeline Mistretta is director of marketing at Burns & Levinson LLP, with 130 lawyers in MA and RI. She’s served on the board of LMA’s New England, and been active on committees for LMA NE and LMA.*

### Julie P. Meyers



The old saying—“The customer comes first”—applies here. Assuming the client feels the problem cannot be rectified, I see no alternative but to remove the senior partner from the client’s matters. Understand the client’s preferences, so that you avoid replacing the partner with another attorney with similar characteristics.

Communicate the decision to the partner delicately. Attorneys should understand that relationships between clients and their attorneys are personal and, often, a client simply prefers to work with one attorney over another. Communicate to the client that the partner will no longer be working on his matters. If the partner is a valuable member of a client team,

you may think about asking the client if he would object to the partner working on his matters in a supporting role. If the client says “no,” you must abide by that decision.

Also, use this as an opportunity to strengthen the client relationship by explaining that the firm is replacing the partner because its relationship with the client is of paramount importance. Assure the client that you will not bill for the replacement attorney’s ramp-up time. By doing the above, you will keep the client who will, no doubt, feel appreciated and that he “comes first”.

*Julie Meyers, Esquire, CMO at Burns, White & Hicketon, is a former practicing attorney with more than 15 years of marketing and business development experience. She has implemented client interview programs at several law firms in Philadelphia.*

### Peter A. Johnson



Firms must commit to respond to the client’s concerns and demonstrate that they “hear” the client or they shouldn’t conduct the interview. In a recent interview I conducted, the client raised rate issues—although the firm was not prepared to simply reduce rates, they opened a dialogue about alternative fees, staffing etc. and the discussion solidified the relationship. This situation requires a similar dialogue and a commitment to make a change.

Firm management must meet with the client—and based on that meeting, develop a plan to (i) reconcile the differences with the partner or (ii) transition the work to another attorney with whom the client is comfortable. Furthermore, the partner needs to be counseled on issues raised and discuss whether the relationship can be salvaged. Sometimes even great lawyers do not have the chemistry or personality to match up with certain clients...the same lawyer could be the favorite lawyer for other clients.

Imagine the damage if the firm had NOT conducted a client satisfaction interview. The client may have shared with colleagues how unhappy they were, and likely fired the firm. When dealing with clients, to guess is cheap, to guess wrong is expensive.

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