Achieving Client Loyalty

November 2, 2012

What are the three most effective activities, initiatives, strategies in which you or your firm (company) engages to ensure client loyalty?

LMASE Member Responses

PERSONAL RELATIONSHIP BUILDING

- Keeping small, sincere touches going in client relationships - our events we invite clients to, holiday cards and nut tins and even just a simple e-mail or phone call to say hello help solidify that connection and hopefully loyalty to our attorneys and our firm.
- Our clients become more loyal as our attorneys **strive to build authentic relationships** with them.
- Remembering significant events such as birthdays, anniversaries, new births, etc. Our firm encourages and *budgets* for client gifts for these occasions specifically.
- Our attorneys strive to extend sincere and *personal* invitations to events and social gatherings when appropriate.
- We push for our attorneys to have real relationships. Know their clients' hobbies, families, likes and dislikes. Sounds too easy, but this is the most important!

- We generally give our attorneys the ability to market themselves however they see fit. There are no restrictions to what they cannot do to entertain a client. (Thankfully we hire smart attorneys who know good boundaries of good v. bad or right v. wrong but we don't hold them back in keeping their clients happy.)
- Client entertainment/gifts
- Be thoughtful, sending a client's child a gift after they had surgery will go a long way.
- Client entertainment (I'm talking good, old-fashioned client entertainment, like taking clients out to dinner, lunches, that sort of thing).
- We are all about relationships - we strive to ensure our clients know us well.
- The power of developing personal, and multiple relationships with our clients' in-house teams. Build your contact lists and create value by personal outreach to those contacts.

IN-PERSON MEETINGS

- Coaching our attorneys to always communicate with their clients in person when they can. You can't always build relationships through email but you can break them.

CHARITABLE CONTRIBUTIONS/PRO BONO WORK/COMMUNITY OUTREACH

- Embracing the causes of your client as your own - We take up the charitable causes championed by our clients out of respect for them and their company's commitments. From golf tournaments to special events, we do our best to support the efforts of our clients in the community and use our own resources to promote those causes.
- Our attorneys often partner with clients on joint service projects, pro bono work, etc.

- Instead of client gifts and cards for the holiday, we do a community outreach project and use video and photography from the project in our electronic holiday card. We show that we are taking care of the community where our clients do business.

CLIENT INTERVIEWS/FEEDBACK

- Client interviews - in person and electronic
- Client Interviews by outside party
- Regularly ask for feedback from your client and actually take the steps to improve!
- Surveys to keep tabs on things
- After every matter closing, we highly encourage the attorney(s) to conduct a client satisfaction meeting whether on the phone or in person. The purpose of these meetings is to ensure client enthusiasm. We want to make sure the client is happy and that we did everything we could. We understand that client feedback is very important to uncovering possible problems that would detract from client loyalty.
- We show our clients that we value their feedback about our work, rates, etc.
- Conduct small focus groups

UNDERSTANDING CLIENTS' BUSINESSES

- Know, understand and be proactive about the clients business not their legal needs
- When our attorneys **anticipate the needs of our clients,** and proactively follows through, client loyalty is strengthened.
- We strive to know our clients' businesses inside and out.
- Being a trusted business advisor that understands client's business, can offer solutions based on their goals, and opportunities.
- Introduction to others, helping them increase business (what's in it for them) and keep the relationship going

- Make sure we know the real needs of the client- ask, listen, pay attention, visit.
- · Understand the business/industry environment and company

AVAILABILITY AND RESPONSIVENESS

- Always make yourself available and manage expectations
- Responsiveness, responsiveness, responsiveness

DEMONSTRATE CORE VALUES

- Authentic core values are so important (who are you when no one is looking).Clients want to work with attorneys who are **truly good people** and have their best interests in mind.
- Be honest with your clients! Character often trumps competency!

EXCEEDING EXPECTATIONS

- Achieving positive results that meet or exceed client's expectations and [expectations about] budget.
- Do phenomenal work with great results and provide write-downs occasionally – keep your clients happy
- Understand what value means to them and work to deliver that.

EDUCATION/TRAINING

- Continually educate our clients on emergent legal issues - never a hard sell, or a sell at all, but genuinely seeking to inform our clients and equip them with proactive strategies for their business.
- We try to loop training that they need into our social time with them. We are mutually getting something that fulfills both our needs. I know this would not apply to everyone's practice but for us it works.
- Provide continuing education (either by attending industry conferences and downloading, providing seminars, presentations etc.
- Hosting free seminars
- Legal Updates and monthly client newsletters

IN PERSON MEETINGS

- Hold client appreciation visits. We visit our clients (all sizes, revenue amounts, industries) and just thank them for our relationship and then ask what we can do to better serve them. We do not bill for this meeting and we are open to any and all feedback
- Learn more about client's business in face-to-face meetings (without charge),

EVENTS AND ON-GOING COMMUNICATIONS

- Providing relationship-building opportunities in the form of client events such as networking initiatives, closing dinners, receptions, and sporting/concert/etc. events.
- The events we host have a very targeted audience thanks to our amazing events team. We really do tailor our events to the client's needs and interests. This shows we know what is important to them and are trying to actively meet their needs.
- Asking clients to be our guests at events.
- Client appreciation events/seminars - we want our clients to know they are appreciated and that we are invested in their people.
- We continuously send electronic alerts and newsletters that are client/industry specific. We use our CRM system to "sign" each newsletter from the attorney, not just from the firm.
- Monthly email communications to inform clients and prospective clients about new legislation, etc., Blogs-specific to certain practice areas i.e. Healthcare/Class Action, conducting regular CLEs/Educational Seminars, offering client and prospective client onsite trainings.

CO-SPONSORSHIPS

- Sponsorships as requested by key clients
- Offering clients exposure at large seminars/events by partnering/co-sponsoring or offering significant speaking roles

KEY CLIENT/CLIENT DEVELOPMENT PROGRAMS

- We have implemented monthly client development team meetings in each of our offices. These meetings are an opportunity to share with other attorneys in the firm progress on new and existing client opportunities and next steps.
- Anchor/Key Client Program

RESEARCH

- Preliminary and ongoing research (even if existing client)
- We provide research that is targeted to a client's needs – not just our services.

PROJECT MANAGEMENT AND BILLING

- Include clients in the strategy analysis process
- Legal project management
- Paying special attention to what we write on our bills. This includes taking the time to show write-offs and laying out where we added value in the bills before they are sent to the client.
- Communicate regularly with clients, including both good and bad news.

CHANGE THE INTERNAL (FIRM) MINDSET

- Ongoing attorney development training/coaching (lunch panels, external consultants, etc.)
- Training sessions and presentations to all levels of attorneys on how they can better serve their clients and provides tips and techniques on keeping clients satisfied. This may range from establishing what the clients perceive to be excellent service to the importance of cross-selling and becoming the go-to firm.
- Promoting a stronger business/client development mindset internally
- Take client feedback and use it to help develop Marketing and BD programs.
- "We work to tailor around our client's desires and work internally to give them a consistent experience."