

# Customer Service for Law Firms: The 4 Keys to Success



Customer service for law firms is key to generating and retaining a strong book of business. Many firms believe providing great service stops at winning a case, but for clients, it's much more than that. Taking the time to evaluate your processes to ensure you 'wow' each of your clients will yield a greater return for your firm in the long run.

If you're unsure where to start, continue reading to unlock the 4 keys to a successful customer service strategy.

## **Key #1: Maintain consistent and broad communication**

To communicate effectively, you'll need to identify your two important details:

1. **Client expectations:** What sort of information do your clients want from you (e.g., documents, product updates, responses, etc.)? How often do they want to hear from you? Who needs to hear from you? Is it a single point of

contact, a small group of decision-makers, or a Board of Directors?

2. **Client communication style:** Your client communication style determines how you communicate with your clients. Here's a brief table outlining three common communication styles.

You'll need to identify these details and add them to your client intake process well before your client's matter is underway.

	<b>Traditional</b>	<b>Contemporary</b>	<b>Future-focused</b>
<b>Availability</b>	During office hours	On-demand	Proactive, available 24/7
<b>Preferred channels</b>	Phone, in-person	Traditional + digital	Fastest available channel
<b>Data requirements</b>	Just the essentials	Everything I need to know	Access to all data, on an as-needed basis

Your client may have traditional availability, future-focused communication channels, and contemporary data requirements. These details need to be flushed out ahead of time, during your firm's intake process. This is how you provide your clients with the communication that best suits their needs.

## **Key #2: Relationship matchmaking**

Your clients will likely have a mix of the [big five personality traits](#). These personality traits determine whether your partners and associates will "click" with clients:

- **Openness:** Clients who are high in openness have a greater degree of intelligence and intellectual curiosity. These individuals and firms value knowledge, competence, experience and data more than other personality types. Truth-telling is always important but it's especially important with these clients due to their intelligence and natural curiosity.
- **Extraversion:** These clients are outgoing and skilled connectors. They value relationships and the activities that build these relationships – rounds of golf, dinners, events, etc. These clients are best matched with an extroverted partner or associate in your firm.
- **Agreeableness:** These clients are cooperative, easy to work with, polite and compassionate. They're not always as honest, open or transparent as they need to be due to a strong fear of conflict.

- **Conscientiousness:** These clients are highly self-disciplined. They're reliable, trustworthy, organized and efficient. They look for well-planned and properly executed projects and matters. These clients are often traditionalists, people who prefer to do things the way they've always been done.

These details matter because they can help you figure out your client's personality and how they may interact with you. It's best if your client's point of contact, a partner or associate, matches your client (point of contact). I realize this isn't always feasible, especially for small and one-person firms. In those cases, you'll need to be all things to all clients.

If your client is agreeable, work with them, be agreeable. Have a conscientious client, but you're not as conscientious as you'd like to be? Recruit a [virtual assistant](#) who can help you produce the results your client needs to feel secure. Customer service for law firms is about meeting clients where they are and building of what is in their best interest.

### **Key #3: Display competency at multiple levels**

Your clients want the best attorney money can buy. You're a credentialed and highly educated legal professional. Prospective clients assume that about you because you're knowledgeable, you attended law school and you have lots of experience. This kind of credibility is helpful but it's even better presented when you have demonstrated yourself as a thought leader or educator.

In addition to the broad competency we've just covered, you need to provide the following:

- A demonstrated ability to simplify complex information
- Demystify the law/make it simple
- Explain the available options to your client in a way that simple and concise
- A professional distance (i.e., no inappropriate schmoozing)
- Set and meet deadlines

These details are simple, but they're not always easy to relay to your client. Especially when it comes to discussing legal terminology. Clients want an attorney who understands the law but has the competency to bring it down to their level.

## Key #4: A strong value proposition goes farther than you think

Rightfully, clients expect transparency when it comes to the price of your services. It matters to a certain extent, but what really matters more is **value**. A strong value proposition means your clients are willing to spend more money with you than they would with a competitor.

What's a value proposition?

"The value a company promises to deliver to customers should they choose to buy their product. A value proposition is also a declaration of intent or a statement that introduces a company's brand to consumers by telling them what the company stands for, how it operates, and why it deserves their business."

A strong value proposition acts as an economic moat. With an economic moat, it's difficult for clients to leave (they don't want to) and harder for competitors to attack your firm.

- **The brand moat.** With the brand moat, customers are willing to pay more for your service because of what they get in return (e.g., prestige, reputation, quality, etc.) — the brand recognition from firms like Cravath, Swaine & Moore.
- **The secret moat.** Intellectual property – copyrights, patents, trademarks, trade secrets – anything that fits into these categories makes it difficult for competitors to compete with you. Amazon's one-click, Google's search algorithm and KFC's secret recipe are all secrets.
- **The toll moat.** This means you have exclusive control over a market or niche. You're the only game in town, so if customers want it, they'll have to come to you. It's Google's search algorithm and its accurate search results.
- **The switching moat.** Businesses with a strong switching moat are tangled up in their customer's daily life. Amazon continually adds free products and services to Amazon Prime. Customers fill these services with their data, making a separation incredibly difficult. The more clients depend on your law firm, the harder it is for them to walk away

These moats are created in two ways: **(1.)** Doing what other firms can't **(2.)**

Doing what other firms won't. The legal industry is a bit more constrained in this area, but that doesn't mean it's insurmountable. Provide customers with a greater level of service, quality of support and you have the tools you need to create exceptional customer service value.

# **Customer service for law firms starts with value**

As you can see, delivering exceptional customer service at your law firm doesn't require a heavy lift. If anything, it's expanding on processes you already have in place, such as intake. Using client intake as a deep dive into a client's needs, communication style, personality, etc. will make providing great service simple.

Try implementing the four keys to customer service in your practice and you'll find it's easy to attract and retain the outstanding clients your firm needs to grow.