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LEGAL MARKETING

A Checklist to Make Sure Clients Have a Great Experience Dealing With You

BY STACY WEST CLARK

Special to the Legal

Have you asked your clients if they were frustrated by anything you or the firm did? Have they ever complained about how hard it is to reach you or someone on your team?

A not-so-secret secret—your clients and others do have issues with the kind of service you are providing (or lack thereof). You may not be hearing about it. But they are telling me and others. Let's remember—everything you do must be viewed through the eyes of your clients—not through your eyes as to what is convenient or works best for you. This includes your “back-office set-up.” It's all about your clients—right?

Accessibility and responsiveness have long been the two most important foundations of client service. Yet, I am constantly amazed and surprised by how hard (and yes, frustrating) it is to reach attorneys—to hire, refer work to and more.

I know you were extremely busy in 2021. But no matter your billable hours, you should



STACY WEST CLARK

has been successfully helping Delaware Valley lawyers and law firms expand their practices and substantially grow revenues for over 25 years. A former attorney with Morgan, Lewis & Bockius, she was the firm's

first global director of client relations in the 1980s and 1990s. Contact her at www.stacyclarkmarketing.com.

set up your practice on all levels to ensure an outstanding client experience. How?

It so easy, so cheap, and so important to do.

In the words of Dennis Snow—my guru on creating an unforgettable client experience and a veteran Disney executive: “everything speaks.” The moment someone calls you, emails you, visits the office, meets with you on Zoom, talks to your assistant, associates, paralegals—you are being evaluated.

We of course do this every day too in our own lives when we deal with sales help, doctors, receptionists, call centers, tellers—anyone we interact with. We quickly judge our experience as positive or negative. Then, we tell others how we feel.

Importantly, it is totally in your power to insure that interactions with you or your office, especially in an emergency situation—are all that they should be from the client's point of view—not yours.

YOUR CHECKLIST: FUNDAMENTALS TO CREATE AN OUTSTANDING CLIENT EXPERIENCE

Review this with your assistant, office and IT manager!

- Call yourself.

How many rings until your phone is answered by a human or a message? It should be within three rings. If you are not available, it should go to voicemail on the fourth ring.

How is your phone answered? What is the tone and voice like? Solicitous or robotic?

If a caller gets your voicemail, are there clear instructions to get them to a human being who can help? With some firms not having full-time receptionists in their offices right now, it can be extremely difficult to find you! Clear this up.

Call your firm's main number and see how easy it is to reach you

or someone who can actually help your caller. How knowledgeable about you is the person who takes the call?

- Check your response to emails.

How fast do you acknowledge receipt of an email—even if you cannot fully answer?

If you are in court or tied up for more than an hour, you should have someone constantly checking your email and phone for emergencies. Set up this system now.

Is your email signature complete with your address, phone (yes, cell too), logo etc. I find so often it is not, and I must look up the attorney's phone number when I need to speak with him or her directly. Your clients, referral sources and more should not have to spend time doing this. Sometimes I can find you on Twitter faster than by phone. Is that the experience you want your clients and referral sources to have?

What is your “out of office message” like? Does it communicate where you are (“I’m in depositions in Chicago till 5 p.m. Central Time”) and how to reach you or other members of your team ASAP? Or does it (annoyingly) say you are out of the office and not checking your email until the next Ice Age? Kidding but you get it.

- What is it like to have a Zoom meeting with you?

Are you dressed and groomed like a lawyer should be? Do you look like you are worth your hourly rate? Even if your clients dress casually and you work remotely, you should not be “dress-cozy.” You are still being sized up!

What does your face look like on camera? Are you looking at the lens straight on or up or down—just because of the angle where your chair sits or that is just more comfortable for you? Well, you don't look good doing that and we want folks on zoom to see your face in the best possible form.

Check the background behind you—see how professional it is,

You have the power here to create either an indifferent, or worse, frustrating, experience for your clients—or—one that makes each one feel personally cared for and in the best of hands.

does it detract from your face, is it too busy or messy?

Check your lighting. Have some!! You don't want to be shrouded in darkness.

- Check your social media?

Are your posts all about you or do they contain information helpful to your connections with whom you are interacting of the platform? Eighty percent should be helpful news to and for your connections, with just 20% being about your achievements.

Do you use graphics or are you always communicating with just black-and-white text? Photos, graphics, charts, colors all are more interesting and pleasing to the reader than just straight text. Studies have confirmed this!

- Check your appearance before heading out the door.

Look like a top professional—it really matters.

This counts for weekends and holidays too. While you don't need to wear business attire, you should look “organized and neat.”

- Do a Google search of your name.

You will be amazed at what you might see on the first three pages of the results. There might be numerous mistakes on different websites you need to clean up. It's up to you to do it. Especially if ethical concerns are triggered by a website saying you practice law in an area which you don't.

So, check out all points of dealing with you. Do they satisfy your clients and colleagues needs?

Do they silently communicate “you are the most important person to me” every time?

You have the power here to create either an indifferent, or worse, frustrating, experience for your clients—or—one that makes each one feel personally cared for and in the best of hands. Fix things now. As always, I'm rooting for you. •