ERIN BRERETON
Owner
Chicago Journalist Media

4 Ways to Gain a Stronger Perspective of Clients' Needs

If your firm is only focusing on current legal service requests, you could be missing out on chances to assist clients.

In today's competitive legal services market, thoroughly comprehending how clients operate can be critical. More than a third (39%), according to a Wicker Park Group survey, say understanding their business and industry is their top criteria for selecting a law firm or lawyer.

It can also strengthen firms' relationship with clients. Eighty-three percent are willing to consider hiring a law firm they're already working with to provide additional legal services.

Firms, however, don't seem to be taking full advantage of the opportunity. In 2018, 42% of clients said law firms' efforts to provide additional expertise exceeded their expectations. Today, only 20% feel that way.

If your firm could benefit from reevaluating how it caters to clients, potentially implementing some of the following approaches may be helpful.

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1. MAINTAINING TARGETED COMMUNICATION

After appraising new clients' current needs during the intake process, pursuing regular contact can position a firm to find out about upcoming plans that might require additional legal services.

The Law Office of Min Hwan Ahn decided to augment its offerings after a client the firm had been providing immigration law services to reached out about corporate formation and contract guidance for a new venture.

"This conversation sparked the realization that many of our clients had similar needs, leading us to expand into business law," says Pennsylvania attorney Min Hwan Ahn. "Over time, as we gained a deeper understanding of our clients' diverse needs, we strategically

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Understanding the specific concerns clients have can also help law firms more effectively underscore their value proposition.

Before launching the David J. Greiner Law Corp in 2022, David Greiner, who was admitted to the California Bar in 2003, served as the president of automobile dealership for two decades — where he found identifying and emphasizing the aspects of a deal that matter most to clients can enhance their satisfaction level.

For instance, Greiner was negotiating the purchase of several vehicles that were being tailored to meet a company's specific operational needs. He knew the organization felt a seamless transfer of service agreements after the sale would be necessary to maintain uninterrupted service delivery to its customers — so he included data and case studies in the business proposal that highlighted the dealership's track record of executing smooth transitions.

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2. UTILIZING EXTERNAL RESOURCES

Greiner says being involved in automotive trade associations and conferences helped his dealership employees keep up with regulatory changes, consumer demands and technological trends. He has also encouraged the attorneys in his law firm, which has a focus on real estate and business law, to join real estate organizations.

"These associations help by hosting regular seminars and workshops on local property laws and zoning regulations," Greiner says. "They also provide newsletters and updates that keep us informed."

In addition to research tools such as industry publications and legal databases, ongoing relationships with business consultants and other professionals have helped Ahn's firm anticipate new legal service needs.

After accountants and financial advisors mentioned their clients were becoming increasingly worried about financial losses, reputational damage and other possible data breach consequences, the firm decided to leverage its relationships with cybersecurity consultants who Ahn felt could provide his clients with customized support.

The consultants conducted thorough assessments of clients' existing systems, identified potential vulnerabilities, recommended appropriate security measures and provided ongoing monitoring to ensure the implemented safeguards were effective.

Ahn's firm assisted clients with the legal aspects of data privacy, helping them navigate complex regulations and draft the necessary policies and contracts. The feedback he's received has been overwhelmingly positive.

"Our clients gained access to a team of legal and technical professionals who worked together to address their data privacy and cybersecurity needs," Ahn says. "They appreciated our proactive approach [to] identifying and addressing their concerns, as well as our ability to connect them with the right experts to meet their specific needs. [It] not only strengthened our relationships with existing clients — but also attracted new clients who valued our commitment to providing comprehensive and innovative solutions."

3. FOSTERING INTERNAL RESOURCES

Both clients and attorneys believe outside counsel's ability to demonstrate its business savvy is one of the most important aspects of a law firm's value proposition, according to a survey conducted by Thomson Reuters.

To ensure the value the firm provides is accurately being conveyed to clients, some have created a client services or experience group — which appears to be a viable strategy. More than half of large and midsized law firms classified their client services team as a very or somewhat effective marketing and business development activity in another Thomson Reuters survey.

The client value program national law firm Troutman Pepper launched several years ago, Troutman Pepper Plus, essentially combines various firm capabilities to support the client experience

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team's work analyzing litigation trends, clients' position in the market and what issues they're facing, according to Director of Client Experience Erin Murphy.

"We say the client experience team is the tip of the spear," Murphy says. "We have an innovation team who can help build custom technology solutions, a dedicated function that can help us design pro bono opportunities that are of interest to our clients so they can work alongside attorneys to benefit their communities. Clients [are] engaging with us to see what else we can do for them besides exceptional legal services."

In 2023, the firm, which has more than 20 offices across the United States, launched a daylong summit event for its clients' legal operations professionals.

"They're the ones who are driving efficiencies in law departments," Murphy says. "If a company is going from 50 outside counsel firms to 10, the legal ops team is running it. We found they were a somewhat underserved segment of our client base; our attorneys were mostly interfacing with the lawyers in the law department."

At the firm's summits, which to date have been held in Atlanta and Philadelphia, participants may collectively discuss how to undertake an upcoming initiative, or their thoughts on generative AI.

"We're purposeful in how we designed the programming," Murphy says. "It's not folks just sitting in a room and listening. It's really about building a community amongst the legal ops folks. That's allowed us really great insight into what our clients are doing operationally — which we can bring back to our lawyers and say, 'This is what you might have to do from a service perspective to address what we are seeing on the in-house side.'"

Some law firms may be hesitant to add a client services team because they tend to cost, not produce money. Often, marketing and business development employees at firms are tasked with client experience duties, instead of it being a dedicated function, according to Murphy.

"The challenge [for the industry] has been explaining to lawyers what that function is or could be," she says. "We're focused on making those relationships stronger; that, in the end, drives revenue."

4. ACQUIRING FEEDBACK

The Law Office of Min Hwan Ahn sends quarterly surveys via email to gauge clients' satisfaction and any areas where the firm can improve. The surveys may include open-ended questions — such as, "How can our firm better support your business goals moving forward?" — to encourage clients to share their needs and plans.

By uploading the thousands of client surveys and interviews Troutman Pepper has conducted to a tech platform, the firm has been able to draw trends-based information from the data.

"[It] really provides some insights across industries [and] clients on their issues of concern — drivers when purchasing legal services, things that they like, things that they don't like," Murphy says.

Information the firm has gleaned over the years has led to changes in process areas such as billing.

"We've been very purposeful in how we train our attorneys about communicating regarding costs and budgets because the data shows us — our own data, as well as industry-wide data — it's a hot topic for clients," Murphy says.

While some firms may be hesitant to reach out for feedback, the notion that clients are too busy to provide any is a misconception, according to Murphy.

"They're willing to make the time when they find it's a benefit to them," she says. "We always try and make it clear that this isn't just an exercise for us to collect some insights and never act on it; we want to find out what's working well so we can institutionalize those practices. We want to see if there are any issues with the service delivery."

Ultimately, Murphy says the intent is to solve a client's problems, even if they're primarily internal — such as struggling to manage a large number of contracts, something Troutman Pepper helped a pharmaceutical client remedy by building it a custom platform.

"They're able to track their progress — who it's assigned to, where it is in the process — then report to folks outside of the legal department what came in this week, went out, is still in the queue," she says. "When we explain to clients how we can save them time, make them more efficient, make their experience better, they're always willing to have a quick call with us to figure out what we can do for them. It's all to make their lives easier."

ABOUT THE AUTHOR

Erin Brereton is a freelance writer, editor and content strategist who has written about the legal industry, business, technology and other topics for 20 years.

breretonerin@gmail.com

twitter.com/erbrer09

chicagojournalist.com