What Does it Mean to Run a Client-Centered Law Firm?

Written by Teresa Matich

The idea that client-centered law firms are more successful is not a new one. Forward-thinking lawyers have been taking this approach for years.

However, as Jack Newton emphasizes in his new book *The Client-Centered Law Firm*, it's now more important than ever that law firms who want to stay competitive take a client-centered approach.

Hear more about what he has to say in this interview with Christopher Anderson on *The Un-billable Hour.*

In an age when there are plenty of options for the alternative delivery of legal services, and when clients have come to expect the instant service and satisfaction they get from Amazon, Netflix, and Uber in every consumer interaction, law firms that are thoughtful, responsive, and engaged with their clients will set themselves apart.

The client-centered law firm

Running a client-centered law firm means putting your clients at the center of your thinking. This goes beyond the legal deliverable you provide: Being client-centered means truly putting yourself in your client's shoes and looking at the experience of hiring a lawyer and going through a legal matter from their point of view—and thinking through how you can provide a good client experience in a way that's efficient for your firm.

As a lawyer, your job is to help your client resolve their particular legal issue, in a timely—and hopefully affordable—fashion. A client-centered approach can help with this: Building trust with your clients can help make it easier to get the information you need, to build a good working relationship with your clients, and to leave them satisfied and willing to refer more clients to you once their case is closed.

Taking a client-centered approach is good for your internal operations too. Consider: Creating a well thought out onboarding experience—investing in the right tools, thinking through the right processes for your firm, and evolving that process when you see opportunities to improve—might require some investment, but it will lead to a faster onboarding process and fewer questions and confusion for the duration of your engagement, keeping overhead low and staff happier.

Key client-centered terms you need to know

Since the benefits of a client-centered approach have been borne out extensively in other industries, being "client-centered" has become essential for modern businesses. Companies have entire roles, and even departments, dedicated to customer success (think "customer journey advocate"), and there are a number of terms that will be helpful as you move towards taking a client-centered approach for your firm.

Client journey

The client journey refers to the path the client takes: from first contact with your law firm, to interest, to engagement, to hiring you, to you working their case, and finally, to closing their case.

Considering the complete client journey and how each stage flows to the next is key for creating a positive client experience that sets your law firm apart. In fact, some companies —including large law firms—pay a pretty penny just to examine their customer journeys and look for ways to improve. This process is called customer journey mapping.

Customer experience

The customer experience amounts to a client's overall experience with your product, your brand, and everything to do with your company. An important distinction here, is that this refers to your client's point of view and how they perceive their experience with your firm, which may differ from how you think of your firm.

NPS®

A Net Promoter Score, or NPS®, is a metric commonly used to rate customer satisfaction, calculated based on answers to the question "On a scale of 0-10, how likely are you to recommend my service to a friend or colleague?" Each response is sorted into Promoters (9 or 10) who would actively promote your service, Neutrals (7 or 8) would be neutral, and Detractors (0-6) who would actively be negative about your service. Calculate your law firm's NPS® by subtracting the percentage of detractors from the percentage of promoters. This will give you an NPS®S score ranging between -100 to +100.

Companies typically survey clients at various stages along the customer journey to get more detailed insights into different aspects of the customer experience. Businesses will also ask for opportunities to improve the client experience, thereby improving their NPS®. Plenty of law firms calculate their NPS® to help keep themselves on-track to deliver an amazing client experience.

You can learn more about NPS® in the *2018 Legal Trends Report*.

How to run a client-centered law firm

So you want to build a client-centered law practice. What does that look like?

At the heart of it, being client-centered is about being deeply empathetic towards your clients and their needs. Making small tweaks that show you truly understand what your clients are going through and what they're looking for can help your firm stand out, and can make your day-to-day easier too. Below are a few concrete tips for building a client-centered law firm.

1. Put your clients at the center of your thinking

When your law firm makes a decision, evaluates a new tool, or tries a new process, do you think about how it will impact your clients and their experience? Thinking of your clients in all things is the first critical step towards running a more client-centered practice.

It's important to innovate and make changes in your practice, but each time you do, ask yourself, "what will this mean for my client?"

Better yet, look at your existing processes, tools, and setups, and how those impact the client experience. Do you send multiple forms to clients when you could be sending a single form? Are your intake forms easy to understand, and do they ask for only relevant information? How fast do you respond to client requests?

Wherever you see a gap, look for an opportunity to improve the experience clients have with your firm.

2. Consider the entire client journey

It's important to start considering your client's experience right at the start of their client journey, from when they first realize they have a legal issue, through to when they inquire about your services and book an initial consult, to when the final bill is paid and your firm asks for a referral.

It's also worth considering what happens after a case is closed: What's your final billing process like? Are your bills clear? Is any further follow up required?

From your client's point of view, this is all one continuous experience, and some additional thoughtfulness towards making each stage run smoothly goes a long way.

3. Give your clients what they're looking for

Your clients don't just come to you to get a legal issue resolved: They come to you for peace of mind, reassurance, emotional support, advice, and more.

Lean into this—finding better ways to address these client needs will show your client you care and help them rest easier, but the right approach will also help you handle these realities more efficiently, meaning you're able to balance yourself while building trust and feeling you're serving your clients so that you can provide great representation.

Plus, the more empathetic you can be, the better positioned you'll be to handle your own stress, support your client emotionally, and do your best work. As health psychologist, Stanford University lecturer, and international best selling-author Kelly McGonigal said at ClioCon 2018, being truly open and empathetic with your clients—rather than nodding and acknowledging their situation but still keeping your emotional armour on—helps your clients feel heard and calms them. It also clarifies your own goals about how to address the situation.

Kelly explained:

> "One of the things people do which turns out to be less helpful than people expect is to try to create an armour. They might think 'I'm going to go into this situation, this person is going to be crazy stressed, and I can't let that infect me. I'm going to stay calm and in control.' But it turns out, when you spend a lot of time with other people who are highly stressed, you have a better chance of dealing well with that stress when you let it be a little bit contagious —so that it activates in you what you care about and what your goals are in the situation ... Let yourself connect and feel what the situation is, and then get clear about what your role is so you can shift into effective management of the situation ... This will help [your client] shift gears and join you in problem solving as well."

4. Don’t make assumptions

Creating a better client journey and overall client experience at your law firm means truly seeing things from your client’s perspective. That means gathering insights into the client experience straight from the source: Stay engaged with your clients, and look for opportunities to get insight into their experience.

Bill Burnett and Dave Evans, authors of the #1 New York Times Best Seller, Designing Your Life and keynote speakers at ClioCon 2018, had a few ideas to help with this. For example, Dave noted that there’s a subtle but important difference when a lawyer tells a client what to do, versus when they present them with several options, explain the consequences, and let the client make the choice: In the former scenario, the lawyer is the authoritative person at the center of the experience, while in the latter scenario, the client is at the center of the experience.

To get more insight into the client experience, Bill suggested taking the time to get coffee with a few past clients to ask about their cases—whether they knew what was happening, and whether they felt like they were getting updates often enough, for example. “You may get answers you don’t expect,” Bill said. “They may say, ‘Actually, I didn’t understand what this meant on my bill. Could you tell me what this means?’”

This can be a gold mine in terms of finding opportunities for your law firm to tweak the way it operates and stand out to clients.

5. Communicate clearly, and often

For client-centered law firms, communication means more than just providing updates on a client’s case: It’s about being proactive so that clients feel informed, and taking the time to ensure clients truly understand everything that is going on.

For example, get in the habit of answering your clients’ questions preemptively. After client calls or meetings, send a message securely that summarizes what was discussed and provides supplemental info for next steps. Stay in regular communication with clients to deliver both good and bad news.

Also, set clear expectations to avoid disappointment. Specify in your engagement letters how often communications can be expected, what they will entail, and how clients can best reach you (phone, email, text, or carrier pigeon) when they have questions.

6. Keep the flywheel in motion

The legal profession is a demanding one. The idea of a client-centered approach seems simple enough, but when you're working 12-hour days trying to get the best legal outcome for your clients—and, depending on your practice area, taking on the emotional stress of a client in a difficult legal situation—adding extras to be even more client-centered may not be at the top of your list.

But the thing is, being client-centered doesn't mean you can't focus on the success of your firm and career as well. The two drive each other: Being client-focused is positive for your firm, because it helps drive a positive reputation and referrals of new business (plus, working with happy clients is just more enjoyable). Being firm-focused is positive for your clients, because running a more efficient, innovative law firm improves your bottom line and gives you more resources for investing in client-centered initiatives.

It all adds up to a virtuous cycle of growth that could lead to your firm succeeding in today's world where client expectations are higher than ever. Jack has spoken about the law firm flywheel effect—the flywheel effect being a term coined by Jim Collins in his book *Good to Great*. The idea is that continuous small improvements and a commitment to a client-centered mindset will, over time, lead to tremendous growth for law firms.

Here's what that looks like:

So, to run a client-centered firm, think about things that make your life easier too. For example, is it worth investing in crafting an especially clear welcome letter detailing firm policies once, so that you can send it out to every client and put them at ease knowing what to expect? Should you switch to emailing bills rather than mailing them, to save on postage and time needed to get your bills out, but also so that receiving bills is more convenient for your clients?

Every practice is different, but take some time to think about what might work best for your firm.

Why create a client-centered law firm?

As a lawyer, you might think you're doing well in this department. After all, you're a professional! You send neatly formatted bills. You keep a clean, organized office. You follow up with client questions within a few days at most.

But, according to the *2019 Legal Trends Report*, lawyers are not doing as well as they think they are when it comes to the client experience.

Take the beginning of the client journey, for example. As part of the report, we emailed 1,000 law firms and phoned 500 randomly selected from the same group. 60% of firms did not respond to our new client inquiries at all. Of the 500 phone calls, 39% went to voicemail—of which 57% didn't return our call within 72 hours.

Clearly, there's some work to do.

There's also a huge opportunity for clients willing to take a client-centered approach.

As of 2016, the size of the US legal market was about $437 billion annually, and market demand for legal services has stayed relatively flat. Meanwhile, as Jack mentioned in his ClioCon 2018 opening keynote, 77% of legal problems don't receive legal assistance, per a report from the World Justice Project. In other words, there's a huge untapped market in legal for firms who strive to make themselves extra accessible by providing better client experiences.

Technology for running a client-centered law firm

In the digital age, it's near impossible to run a competitive law firm without a full tech stack to support you. The same goes for running a client-centered law firm: If you're a solo practitioner, for example, you won't always be available to answer every client phone call, but a receptionist service can ensure someone's always there to pick up the phone when your client is worried.

Beyond that, tech that helps your firm operate more efficiently can boost your bottom line.

There are many tools and services that can help you run a client-centered law firm available in the Clio App Directory. Here are just a few examples of tools you can use to support a client-centered practice.

Bonus: They all integrate with (or are included with) Clio:

Ruby

Ruby's professional and friendly staff manage inbound and outbound calls, provide detailed call records and messages, and take care of client intake. From your end, you can monitor everything from a slick mobile app.

Stop missing calls and losing opportunities, and put Ruby to work for your law firm today. You may never need to hire a full-time receptionist again.

Learn more about Ruby Receptionists.

Clio Payments

The *2020 Legal Trends Report* found that 72% of consumers would prefer to pay their legal fees via a payments plan. The *2021 Legal Trends Report* found that 81% of consumers say a firm's ability to offer payment plans influences their hireability.

With Clio's all-new payments suite built-into Clio Manage, you can make it easy for clients to pay their bills online with debit, credit, or eCheck. Send trust payment requests and maintain evergreen retainers—all while maintaining compliance with trust accounting rules.

Learn more about Clio Payments and read Jack's letter about the all-new Clio Payments.

Clio for Clients

Make it easy for your clients to communicate and share information with you no matter where they are. With Clio for Clients, your clients can securely receive updates, share documents, and access their case information from their desktop or mobile phone. The best part? Everything is automatically stored to the appropriate matter in Clio Manage for you.

Learn more about Clio for Clients.

Clio Grow

Clio Grow is client intake software that helps you see the real-time status of every new lead, and track where they've come from. Beautifully designed dashboards and transparent workflows provide visibility into your client pipeline and revenue projections—all well setting you up to deliver incredible, client-centered experiences.

The best part? Clio Grow syncs seamlessly with Clio's industry-leading cloud-based practice management platform, so you'll be set up to deliver a seamless client experience from intake to invoice.

For example, you could use Clio Scheduler (available with the Clio Suite) to allow clients to seamlessly book their own appointments—no back-and-forth required.

Learn more about Clio Grow.

Conclusion

The future for competitive law firms is client-centered and firm-focused. By putting clients at the center of their practices, forward-thinking law firms will provide better experiences, run their firms more efficiently, and grow like never before.

To recap:

- **Know key client-centered terms.** How's your NPS®? What does your customer journey map look like? Don't innovate in a vacuum: Use established tools to create an excellent client experience.
- **Listen.** Think of your clients first, and don't make assumptions. Ask about their experiences, and look for opportunities to improve.
- **Be deeply empathetic—for your clients and your staff.** Put your clients at the center of your thinking in all things: With the right tools, it's possible to provide a better client experience and make your own life easier as well.

Jack's new book, *The Client-Centered Law Firm*, provides a much more in-depth overview of what it means to run a client-centered practice—including how lawyers can better leverage a multi-billion dollar latent legal market and succeed in today's world. It's available for preorder now, so order your copy to ensure you're one of the first to get it in early 2020.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.