



# Elevate08

22nd Annual Legal Marketing Association Conference  
March 12-15, 2008 • Hyatt Regency Century Plaza • Los Angeles, CA

## **Vehicle for Change: Client Teams and Client-Service Interviews (CSIs)**

LMA National Conference  
March 13, 2008



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## Meet Our Panel

- Steven Rodgers, Intel Corporation
- David Wolber, Paul, Weiss, Rifkind, Wharton & Garrison
- Melissa Hoff, Zeughauser Group
- Mozhgan Mizban, Zeughauser Group



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## Agenda

- Part One: The Voice of the Client and CSIs
  - Importance of CSIs
  - CSI Process
  - Top Ten Themes
  - Client Feedback—The Hot Seat!



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## Agenda

- Part Two: Effective Client Teams
  - Strategic CSTs
  - Effective CSTs
  - Effective CSTs: Case Study
  - Effective Action Plan: Case Study
  - Effective Account Management: Case Study



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## Situation Analysis: The Challenge

- Law firms know it's important to hear from clients
- Increasingly, firms conduct CSIs with their most significant clients to learn clients' expectations and to improve the service ethic within the firm
- After the feedback is received, it's hard to maintain momentum and to implement recommendations



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## Situation Analysis: The Solution

- CSIs lay the foundation for a deeper and more objective understanding of the clients' needs and for providing the highest level of service
- Strategic client teams provide improved account management, facilitate further communication between lawyers and the client, and institutionalize the client



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## **Part One: The Voice of the Client and Client-Service Interviews (CSIs)**



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## Why are CSIs Important?

- Increased client loyalty
- Improved communication between the firm and its clients
- Further expresses to the client that the firm values the relationship
- Increased understanding of how clients perceive the firm and the law firms with which it competes



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## Why are CSIs Important?

- Understanding of key service patterns to be used to develop firmwide service standards and training
- Improved understanding of the range of clients' legal needs
- Using the intelligence to formulate and operate effective client teams



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## Why are CSIs Important?

- Opportunity to review with clients the breadth of services provided by the firm
- Opportunity to learn of, and rectify, potential problems before they jeopardize the relationship
- Development of benchmarks
- Provides important market intelligence about strategy issues facing firm (geographic profile, practice mix, lawyer recruiting, prof. dev.)

The logo for 'Elevate08' features the word 'Elevate' in a red, sans-serif font and '08' in a white, sans-serif font. The background of the top left corner shows a person in a blue suit climbing a ladder against a blue sky with white clouds, and another person's legs are visible at the top of the ladder.

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## Client-Service Interviews: Process Overview

- Develop a list of client interview candidates and select a representative mix of the firm's clients by size of company, nature of legal work performed, geographic location and industry
- Hold initial planning session to discuss the desired outcome, management's role, the process of disseminating the reports and post-interview follow up strategies



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## Client-Service Interviews: Process Overview

- Create a customized questionnaire for the CSIs
- Learn about the client by reviewing financial statements and meeting with relationship attorneys to learn the client's history with the firm
- Develop a final list of interviewees
- Conduct CSIs



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## Client-Service Interviews: Process Overview

- Produce a written report that includes action items and recommendations
- Conduct debrief meetings after the interviews with the relationship partner(s) to discuss high-level themes and immediate action items
- At the conclusion of the project, summarize and present findings and themes to the appropriate group within the firm



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## Listening to Clients: Top Ten Themes

- Responsive
- Proactive
- Meet or beat deadlines
- Work ethic
- Advocate for the client
- Practical



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## Listening to Clients: Top Ten Themes

- Clear communication
- Deep understanding of the business/industry
- Know the company's priorities and goals
- Build relationships at different levels within the client organization (legal team, business team)



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## Case Study: An Effective Follow up to a CSI



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## Hearing From the Client

- How can outside lawyers expand their relationship (cross market)?
- How can new partners and associates develop relationships?
- Examples of best practices in cross-selling by outside counsel?



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## Hearing From the Client

- Barriers to working with outside counsel?
- What has a law firm or lawyer done that stands out in your mind as uniquely positive?
- What differentiates specific law firms in your eyes?
- How would you define “added value”? Is there such a thing?



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## Part Two: Effective Client Teams



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## CSIs Lay the Groundwork for Client Teams

- Voice of the client informs account management strategy
- Accountability is built into the process when the right people see the CSI report
- Action steps for the client team are laid out as part of the CSI process and provide a rallying point for a client-service team



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## Features of a Strategic Client-Service Team

- When not implemented correctly, client teams are not effective
- When designed to serve as “account management” teams that facilitate collaboration between the client and team members, client teams are a highly effective tool



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## Features of Strategic Client-Service Teams

- Information regarding the company and industry is shared with team members
- Accountability is built into the process
- A marketing professional is staffed to support the efforts of the group
- Frequent communication allows for more nimble, practical, tailored service for clients



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## Steps to Building an Effective Client Team

- Identify the right clients around which to build teams by focusing on the number of attorneys servicing the client, the client's industry, geography and scope of services
- Ideally, a client team would consist of attorneys from multiple offices, practice areas and industry groups to increase relevant information flow



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## Steps to Building an Effective Client Team

- Identify a team leader—often this is the relationship partner, but not always
- Talk to the client—if a CSI has not already been conducted, now is the time!
- Create an action plan for each client team
  - Include CSI recommendations



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## Steps to Building an Effective Client Team

- Identify core members and resource members
- All core team members should have a role on the team
- Establish accountability through regular meetings and status updates
- Meetings should be high-value in terms of discussion and information shared/disseminated



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## Steps to Building an Effective Client Team

- Meet every four to six weeks
- Invite resource members to participate quarterly—these might be people who work with the client infrequently, attorneys who have other clients in the same industry and who can help identify trends and developments



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## Developing a Client Team

- How did you decide for which clients to form a team?
- How many teams should a firm have to start and should this progress over time?
- Who should be on the team?
- How did you select a leader?
- Lessons learned?



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## Case Study: An Effective Client Team



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## Case Study: Strategic Client-Service Team Plan

- Create specific action items with timelines
- Establish accountability
- Involve firm leadership



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## Case Study: Specific Attributes of an Effective Account Manager

- Role/importance of relationship partner?
- What does an effective client team look like to you?
- What works?
- What doesn't?



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## Other Questions?

Thank You

The End