Innovations in Client Experience

EDITED BY ALEX DAVIES

Head of events and books
Leah Darbyshire

Commissioning editor
Alex Davies

Editorial assistant
Francesca Ramadan

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UK, Europe and Asia office
5th Floor, 10 Whitechapel High Street
London, E1 8QS
United Kingdom
Tel: +44(0) 207 566 5792
publishing@ark-group.com

North America office
4408 N. Rockwood Drive, Suite 150
Peoria IL 61614
United States
Tel: +1 (309) 495 2853
publishingna@ark-group.com

www.ark-group.com

Layout by Susie Bell, www.f-12.co.uk

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Executive summary

Client experience (CX) is by no means a new concept. Ever since the service industry came into being, providing excellent customer service has been a key concern, with particular focus on how the client experiences the service they are receiving.

Yet, client experience is rarely delivered well. Inconsistencies, errors, and an endlessly unanswered phone lead to frustration on the part of the client, and a feeling that they are worth little more than a signature on the monthly timesheet.

So, how do law firms, and individual lawyers, ensure they exceed expectations, and deliver the best customer experience possible? And what benefits – tangible and intangible – does this bring?

Innovations in Client Experience brings together a collection of global contributors, giving their thoughts and advice on how the legal profession can up its game in client experience, offering innovative strategies and pragmatic advice to those law firms concerned they need to improve their CX.

In chapter one, Ken Grady, adjunct professor at Michigan State University College of Law, highlights that among the challenges law firms face, fixing the client experience ranks as low cost and high return on investment. Yet, despite the advantages and no meaningful disadvantages, lawyers still fail to do so. Lawyers still file briefs filled with errors, create confusing and incorrect documents, and treat their clients with less respect than the local coffee shop when it comes to a consistent, quality experience. In the opening chapter, he sets out some key ways in which this trend can be reversed.

In chapter two, Julian Summerhayes argues the point that lawyers are there, first and foremost, to listen to their clients, and help solve their problems. The trouble is, oftentimes, empathy is missing, and lawyers don't truly serve their clients' needs, but rather point towards a solution that is easy for them to deliver. In this chapter, he offers a radical new way of doing business – offering a money back service in the event that the lawyer doesn't deliver. Because what better way to motivate the lawyer, than to truly put them in the clients' shoes?

In chapter three, Yolanda Cartusciello, partner at PP&C Consulting, demonstrates that differentiating the client experience is a critical component of a law firm's success, and client journey mapping is an effective tool in helping firms differentiate that experience. While client journey mapping may be new to law firms, the technique has been used successfully by corporations across industries and around the world. Consumer product and B2C organizations such as Amazon, Apple, and Disney, as well as B2B and consulting firms such as IBM and McKinsey, have focused on the client journey as a way of improving and distinguishing the client experience.

PP&C Consulting has translated and adapted this technique for the law firm environment, mapping the technique with law firm practice and industry groups, as well as in business development training programs, to help lawyers and firms better understand the experiences they deliver and how those experiences might be improved.

Differentiation through stellar service lies at the heart of FBC Manby Bowdler's vision to be the firm of choice for its community of SMEs, corporates, and high net worth clients. Recognizing that measurement is vital for future development, Kim Carr, managing partner, outlines in chapter four the ways the firm uses client service auditing and online surveying to identify and filter back into departments what is working and what needs changing.

Client feedback is central to the most successful, valuable, and innovative client relationships. While many outside counsel demonstrate an understanding of the legal problems presented by clients, and are dedicated to delivering the best possible client service, not enough time, energy, and resources are poured into asking questions that will lead to increased loyalty, uncover opportunities to add greater value, and stay top of mind. Clients' needs rapidly change. In chapter five, Nathaniel Slavin, founder and partner in the Wicker Park Group, explores how firms can, and should, ask the hard questions to create the best possible client experience, and even innovate how that experience is delivered.

For some years, law firm leaders have recognized the importance of putting their clients at the heart of their business development strategy. To do so, they must be able to understand and anticipate their clients' needs and wishes. Sally Dyson, of Firm Sense Ltd, argues in chapter six that the best way to do this is to solicit feedback and to listen to clients. Despite the aspirations of law firm leaders and directors of business development, many firms fail to engage in a consistent and meaningful way with their clients. Individual partners may not perceive the need or are unsure of how to proceed. This chapter will help individual lawyers to overcome their fear of engaging with their clients outside the narrow confines of their transactional interaction.

Within the context of a rapidly evolving marketplace, competitive pressures are greater than ever – and building. In chapter seven, Ed Bodensiek and Ryan Burruss of Miles and Stockbridge cover the newest wave of both measuring a brand and defining it: the delivery of a superior client experience. Moving past basic concepts of customer service, the more comprehensive CX model involves an inclusive, panoramic approach that positions marketing and business development in the center of operations – blurring traditional lines between finance, human resources, IT and practice management, as well as what it means to "live the brand".

By looking at the general corporate climate as a whole, and then drilling down through the first-hand experiences of an AmLaw 200 law firm's innovative approach, this chapter showcases the power of strategy and change management to redefine how clients measure value – not as a function of cost, but of benefits. For the mid-Atlantic-based Miles & Stockbridge, CX is now a core business strategy. As one of the firm's clients stated, "I feel like a rock star here".

Lawyers have long had a love-hate relationship with technology. The notion of lawyering as an art form puts attorneys at arms-length from computers and automation. At the same time, the tools of the trade are increasingly based in technology. As that technology becomes ever more sophisticated, it challenges lawyers to adapt to a different way of delivering legal expertise.

Artificial intelligence. Robots. Machine learning. The language and concepts seem very new. Yet, the role of technology in the delivery of legal services is not. Over the past few decades, technological innovation has played an important role in slowly reshaping the way in which lawyers conduct their profession. The pace and pervasiveness of change, however, has rapidly accelerated. Emerging technologies, that seem to be developing at a bewildering pace, promise a deeper and more fundamental change in the way in which lawyers operate. Chapter eight, written by Stephen Poor, chair emeritus at Seyfarth Shaw, reviews the historical context of the industry's relationship with technology, and discusses the current stage of technological innovation. Stephen then offers perspectives on how new technologies can augment the role of people and work to reshape or enhance the attorney/client relationship.

Staying with the technology theme, in chapter nine, Judith McKay, chief client and innovation officer at McCarthy Tétrault, outlines the strategy and process behind the development of the firm's groundbreaking software platform, which acts as a single point of reference for information and activities related to every aspect of the client relationship. Offering lessons learned from the design and implementation of the system, including the benefits of taking an iterative approach, and the need to balance deep functionality with an utterly simple user interface, Judith shares solutions to challenges such as selecting software, gathering and entering data, encouraging lawyer adoption, and making continuous improvements to the system. Filled with practical insights and useful guideposts for others looking to adopt a culture of client service excellence, this chapter provides a blueprint for integrating technology into the client service environment at any law firm.

Client service and communication remain the most important drivers to future law firm growth, according to one of the sector's largest research projects, undertaken by LawNet as part of the delivery and audit of its Mark of Excellence. In this final chapter, Helen Hamilton-Smith, LawNet's member engagement and strategy director, outlines how LawNet's network members take part in regular client service audits, with a mix of walk-ins, telephone calls, web enquiries, and out-of-hours calls, combined with online benchmarked customer satisfaction surveying, to identify and measure strengths and weaknesses, and overall satisfaction levels. The results are used to guide future support and developments across the network and within individual firms.

About the authors

As chief client experience officer at Miles Stockbridge, **Edwin Bodensiek** leads the charge on developing and maintaining a comprehensive, premier client service "experience" for the firm. Ed is responsible for developing and implementing a single, distinctive vision across all methods of client interactions. His key focus is to align the voice of the client to strategy and services, as well as to enhance employee experience through culture change. Ed joined the executive leadership team in May 2016. Ed brings a deep background creating distinctive experiences for patients, referral sources, and employees as a significant part of his role as vice president of communications and branding with Select Medical, a $4bn public company. Prior to that, Ed worked for a co-op agency of the US State Department, where he served as director of public affairs for the US Fulbright Scholar Program. He has also worked at the US Department of the Treasury, where President Bush appointed him director of outreach to help establish the President's Advisory Council on Financial Literacy. Earlier in his career, Ed served as vice president of government relations and outreach for Junior Achievement USA, and as senior associate director of communications for The Johns Hopkins University Berman Institute of Bioethics.

Ed advocates for a more intentional design to integrate customer experience, employee experience, and branding. He frequently gives talks on "CX thinking" – specifically how the concept of brand should expand to include heightened customer expectations for every touch point of a business, regardless of industry.

For almost 20 years, **Ryan Burruss**, director of marketing at Miles & Stockbridge, has employed his background in writing, editing, and graphic design in service to helping companies and organizations get their story out into the world. A seasoned legal marketing professional with more than a decade of experience in the industry, Ryan focuses his efforts on reaching the business leaders both of today, and those of tomorrow. Throughout his career, he has brought to the table the experience needed to provide high-level, cutting-edge insight to colleagues navigating the challenges – and, more importantly, the opportunities – facing them as service providers, particularly in the context of the legal world's fast-moving and ultra-competitive business climate.

As the director of marketing for Miles & Stockbridge, a full-service AmLaw 200 firm consisting of more than 250 lawyers, Ryan helps manage the firm's external branding initiatives and provides strategic direction regarding its presentation and messaging across the full complement of traditional and digital outlets available to its marketing team.

Kim Carr has been managing partner of FBC Manby Bowdler LLP since 2005. Previously, she headed the firm's private client department, before leading the merger of FBC Solicitors with Manby Steward Bowdler LLP in 2008. She was named LawNet managing partner of the year in 2012 and has been chair of the LawNet board since 2015. FBC Manby Bowdler is a 30-partner firm with over 200 staff working from six offices across the UK. Alongside rankings in the Legal 500 and *Chambers*, the firm is annually recognised in the *Sunday Times* Best Companies to Work For listings.

For more than 20 years, **Yolanda Cartusciello** has served in senior administrative leadership roles in major law firms, including Debevoise & Plimpton and Cleary Gottlieb. She has led marketing teams, designed business development and media strategies, and implemented client development programs. She has been the chief architect of profile enhancement strategies, perception studies, branding exercises, comprehensive client interview programs, and practice and lateral partner rollouts. She has adapted the customer journey mapping technique for use by law firms, and has trained and advised firms on its use. She is a frequent lecturer and author on client journey mapping and the customer experience. Yolanda has also created business development and communications training and coaching programs for lawyers at all levels.

Sally Dyson is the director of Firm Sense Limited, a legal and professional services sector specialist consultancy where she provides a combination of client listening, executive coaching, and business skills training to help her clients to enhance their personal and team effectiveness and to create and implement client-focused success strategies. Sally's experience working both as a private practice solicitor and as an in-house lawyer inspired her to found Firm Sense to bridge the communication gap between professional services providers and their clients. In addition to her legal qualifications, Sally received her business coach training by undertaking the Meyler Campbell "Mastered" program accredited by the Association for Coaching. Sally is able to administer a range of psychometric and aptitude tests, holds a Lean Six Sigma Green Belt, and is a Member of the Market Research Society. Sally is the author of two books for lawyers published by ARK Group: *Client Listening: Why it Pays and How to Do it* and *Budgeting and Negotiating Fees with Clients: A Lawyer's Guide*. Sally can be contacted via email at sallydyson@firmsense.co.uk. For more information about Sally or Firm Sense, please visit http://www.firmsense.co.uk.

Ken Grady is adjunct professor at Michigan State University College of Law and a member of the LegalRnD Faculty. Ken writes and speaks internationally about innovation and the future of law and business. He is a fellow-elect of the College of Law Practice Management, was named to the Fastcase 50, and honored by the *Financial Times* for innovative leadership. He is Medium Top 50 writer in innovation and editor and writer for The Algorithmic Society (Medium). Ken has been a consulting firm CEO, general counsel and executive for Fortune 1000 corporations, and was a major law firm partner.

Helen Hamilton-Shaw is member engagement and strategy director with LawNet, the collaborative, mutually-owned national network where independent law firms access big firm resources and benefit from collective purchasing, shared knowledge, best practice, and expertise. Member firms range from £2m to £25m turnover and must achieve and maintain LawNet's own ISO 9001 standard and the associated Mark of Excellence in client service.

As chief client and innovation officer, **Judith McKay** leads the McCarthy Tétrault's client relations and marketing strategy, and oversees business development, research, pricing, knowledge integration, and innovation capabilities. She also provides strategic commercial and intellectual property counsel to clients. Prior to joining the firm, Judith (a chemical engineer and an IP lawyer by training) was vice president and general counsel for DuPont Pioneer, responsible for legal affairs internationally.

Client-centric and market-focused, Judith knows how to help general counsel in Canadian, US, and global business environments succeed, precisely because she's been in their shoes. Performing client side at the executive level in a Fortune 500 company has made Judith keenly attuned to the voice of the client and what is of value to them and – equally important – what isn't. She draws from her considerable in-house experience to ensure the firm delivers innovative legal solutions.

Stephen Poor is chair emeritus of Seyfarth Shaw LLP. He served as chair of the firm from 2001-16, leading the transformation of Seyfarth into an international law firm at the forefront of innovation. In recognition of his work to redefine legal service delivery, Stephen was named the 2011 Legal Innovator of the Year by the *Financial Times*, as well as one of Law360's Most Innovative Managing Partners in 2012. Seyfarth was named "2017 Firm of the Year" by ILTA for its work in robotics.

Nathaniel Slavin is a founder and partner in the Wicker Park Group. He plays a key role in all programs offered by WPG, regularly advises law firms on client service strategies, and has conducted client feedback interviews with more than 500 clients on behalf of law firms. He also leads law firm client teams, trains lawyers on all aspects of building client loyalty, and advises individual lawyers on leadership and client development. He has authored more than 100 articles on legal department management and frequently speaks on that topic as well as client service, client loyalty, and trends in the legal industry.

Nat is an elected fellow in the College of Law Practice Management and a Legal Marketing Association (LMA) Hall of Fame inductee. He served as president of the International Board of Directors LMA in 2007 and as a board member from 2003-07 and as president of the West Region in 2017. He served on the board of directors for Across the Table, Open Books, Poder Learning Center, and Shift Worldwide.

Julian Summerhayes is a solicitor, coach, and speaker. Julian currently practices as an in-house lawyer for a small software company. Originally qualifying as a solicitor, he worked in private practice for 14 years before taking a break and spending seven years consulting, coaching, and speaking to the legal profession on a wide range of issues, including client service, digital marketing, and learning and development. During this period, he also acted as chief executive to a small firm where he was able to put into practice some of his more esoteric ideas.