Table of contents

Ack	knowledgements	7
Par	rt 1. Introduction	9
Par	rt 2. The loyal client framework	11
I.	'Loyalty' as defined by clients	11
II.	Clients as loyalists	17
III.	The competitive landscape and how to stay differentiated	22
IV.	The loyal client life cycle	27
V.	Customer experience – going beyond exceptional service to earn loyalty	30
	rt 3. A roadmap: getting started on theht foot with new clients	35
I.	Building the foundation of being trustworthy and trusted	35
II.	Understanding clients	39
III.	Onboarding new clients – establishing mutual expectations and protocols	45
IV.	Seeking client feedback and insights to improve long-term loyalty	49

Pai	rt 4. Developing loyal client relationships	55
I.	From expert to trusted partner and business adviser	55
II.	Developing and nurturing long-term relationships	60
III.	Maintaining and deepening client relationships remotely	65
IV.	Addressing challenging or difficult clients	69
V.	Client account management and key client teams	73
VI.	Succession planning – retaining clients over the long term	1 84
	rt 5. Earning loyalty through value, innovationd collaboration	89
I.	Adding value for clients	89
II.	Initiating innovation and aligning value	93
III.	Client convergence and preferred provider panels	102
IV.	Cross-serving clients (aka cross-selling)	106
V.	The role of collaboration	116
VI.	Committing to diversity to earn loyalty	120
Pai	rt 6. Interviews with industry leaders and innovators	125
l.	Jeff Carr, former senior vice president and general counsel of Univar Solutions and FMC Technologies, and inventor of the ACES Model	125
II.	Mark Chandler, executive vice president, chief legal officer and chief compliance officer, Cisco Systems, Inc	131
III.	Vincent Cordo, former central legal operations officer and global sourcing officer, Shell Oil Co; now chief client development and relationship officer, Holland & Knight	138
IV.	Christopher Marston, founder and CEO, Exemplar Companies	144
Pai	rt 7. Conclusion	
I.	Healthy client roadmap: 25 tips to keep clients happy, satisfied and loyal	147
Pai	rt 8. Appendices	
Αp	pendix I. Covenant with counsel	155
Αp	pendix II. Guidelines and procedures for outside counsel	157
Αp	pendix III. Steps to conducting effective client interviews	160
	pendix IV. Sample client relationship and	165

Appendix V. American Bar Association Resolution 113 to help promote diversity in the legal profession survey	170	
Appendix VI. Case study: Kristen Cook, associate general counsel, 7-Eleven, Inc and SEI Fuel Services, Inc; and winner of two ACC Value Champion Awards	171	
Notes	173	
About the author	175	
About Globe I aw and Rusiness	176	