



CLIENT INTERVIEWS — EASY TIPS FOR TOP RESULTS

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I recently attended a monthly meeting of the Delaware Valley Law Firm Marketing Association. I try to make them every chance I get, because the speakers are very good, and the information is always practical. This was no exception. Martha Candiello presented “Best Practices for Client Interviews” using a number of staged enactments to highlight what to do, and what *not* to do.

Martha E. Candiello, Esq. is the principal of ClientBridge, (<http://www.clientbridge.net/clientbridge.net/HOME.html>) and focuses her consulting on improving relationships between law firms and their clients. She has conducted extensive interviews of law firm clients in many industries around the world. She has over 25 years experience as a business lawyer, including as a General Counsel. Because of her extensive background “in their shoes”, Candiello has the advantage of instant credibility with clients, who welcome the opportunity to share their views. She brought this wealth of experience, along with a sense of humor, to the presentation. What follows are some of the simple rules to follow in order to maximize the effectiveness of client interviews.

DON'T have the relationship partner, or anyone who has an active relationship with the client, conduct the interview. No matter how cordial the relationship, the client will be reluctant to speak with the level of candor required to make the interview a productive exercise. The reluctance may stem from a desire to avoid seeming critical, or to avoid the possibility of damaging the working relationship, or to avoid a “hard sell” in response to questions regarding future challenges and needs.

DO get the maximum amount of information you can during an interview. Provide constant verbal and physical clues that you are engaged and listening. Demonstrate active listening skills by asking additional probing questions, such as:

- Can you give an example?
- Can you elaborate further?

- Who was involved and how did it turn out?
- What do you believe will be the outcome if the firm cannot implement the billing system you request?

DON'T try to solve any problems on the spot. The interview process is solely about gathering information, not presenting solutions. That should be left to the relationship partner. Instead, suggest that the firm will be in contact to further discuss the client's needs.

DO your research immediately before the interview so you're not surprised. Be sure to talk to the relationship partner to find out about any known service issues. Google news about the client, the person being interviewed, the client's industry, and the client's main competitors. One of the scenarios concerned a meeting with a General Counsel who had very recently been terminated. In the first instance, the lack of knowledge about this development threw the interviewer off balance, and substantially diminished the value of the interview. In the second instance, the interviewer was aware of the rumors, and was prepared to offer words of encouragement and support, and indicate the relationship partner was going to make contact to provide information on possible employment opportunities elsewhere.

DON'T try to sell any of the firm's services to the client. In one scenario the client expressed regret that the firm did not provide service in a particular practice area in a particular region. The interviewer was aware that the firm did have an office in the region mentioned, with many attorneys in the mentioned practice area. The correct path to take is to gather information such as:

- Where does the client mean specifically when referring to the region? Midwest, for example, may be serviceable from a firm's Chicago office. But probably not when the client is actually referring to northern Texas.
- Exactly what does the client mean by the area of practice mentioned? What are the specific issues which must be addressed? The actual area of practice may be called something different by the firm.
- What, if any, are the fee budgets and desirable rates and experience levels of the attorneys they wish to retain for the work?



DO follow up! This is the job of the relationship partner. Remember that it is better not to ask, then to ask and then not act upon what you've been told. You need to contact the client after the interview and acknowledge everything that the client brought up during the interview process. You want to express appreciation for the client's participation and candor. You want to engage the client in a detailed dialogue about any needs expressed during the interview. Map out a plan together to demonstrate how those needs will be met. Monitor progress to ensure you deliver on promises made.

DON'T try to fill awkward silences by rushing in with additional conversation. Silence is uncomfortable for both parties. Allow the client's discomfort to grow to a sufficient level, and it will eventually force him or her to respond. The person who has the greatest patience in an awkward silence will be rewarded with the garnering of valuable information. Often, information you would otherwise not get at all.

DO conduct the interviews in person whenever possible. In many instances a firm, particularly a small to midsize firm, will be hiring a consultant to perform the actual client interviews. They will do so because no one at the firm is sufficiently "distant" from the client to obtain totally candid responses. Or they will do so because no one at the firm is skilled enough to conduct the interview in such a way as to maximize value. Or both. In an effort to keep costs down, a firm may desire to conduct interviews via telephone, or even written survey. Although the cost will be lower, this is probably a prime example of the "you get what you pay for" axiom.

DON'T allow a relationship partner to decide not to interview a major client because he or she "knows" what the client feels and wants. Whether it's justified under a cost-reduction excuse, or is the result of the partner's hubris in assuming one can really know it all about client needs, the bottom line is that this just is never true. Not too long ago I demonstrated this to a client. I conducted an interview with one of the most significant clients of the firm, and determined that the client needed assistance in an area of practice the firm was not providing, but was capable of doing so. The partner was astounded. In fact, he had asked the client specifically about this area of practice not long before, and the client said there was no need. The real problem? The client didn't want to be presented with a sales pitch during that meeting. There was also concern that the attorney would "guard" the relationship too closely and attempt to oversee the work, rather than allow the other practice area partner to become the relationship partner directly for that work.



DO remember that the actual process being interviewed will make the client take time to really think about what the law firm can do to make their relationship more comfortable or more productive. Anything you can do to improve the relationship in the client's eyes will further cement the relationship. That's invaluable in today's highly competitive environment. In addition, those additional moments of reflection may cause the client to focus on positive aspects of the relationship that they don't often stop to think about.

DON'T allow anything to interfere with your focus, especially in the client's eyes. If they're going to take the time to participate in the interview, they want undivided attention. And that goes for meetings with their lawyers, too. Don't read the Blackberry. Don't check caller ID when the phone vibrates. Don't glance at your watch, except if you're indicating you're being mindful of the client's time constraints. And try not to write down every word – it distracts from your ability to actively listen, and often makes the person speaking self-conscious.

Client feedback is essential. In fact, clients *want* to be asked what they think about the relationship, how the firm is doing, and what the firm can do better. As Candiello pointed out, when she was General Counsel she dealt with over a hundred different firms, yet only one firm in all that time actually asked for her feedback in this manner. The firm was always her most favored thereafter.

Since that time, a lot of firms of all sizes have realized that conducting client surveys can pay huge dividends. Even setting up an inexpensive quality initiative to provide clients with an easier vehicle to provide feedback on an on-going basis — such as a postcard questionnaire sent out with billing — can greatly enhance the relationship between the client and the firm.

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