



IMPROVING CLIENT SERVICE: YOUR EMAIL AND FAX

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No one has to tell you that how competitive the legal environment is right now. You're living and breathing it on a daily basis. Fewer clients. More lawyers. Less client loyalty. Depressed billing rates. Flat margins. Out-of-control escalating wages and technology budgets. Increasing personal sacrifices for lessening financial rewards. No doubt about it, it's tough, and getting tougher all the time. Given today's business environment, no firm can afford to overlook any opportunity to improve upon client service.

My last article focused on ways to improve client service with your telephone and voicemail habits. Email is another form of communication which is subject to poor client service. Below is an actual email exchange I had recently with a software company, and it provides a perfect example of what NOT to do:

Me: I am interested in your product ZIGGY. Will it run under Windows 2000 Professional, single user/single computer?

Them: Thank you for contacting us. ZIGGY Software will be exhibiting at the following dates and locations. . . Jennifer, Customer Service

Me: Your response did not answer my question, which is very specific. Does ZIGGY run under Windows 2000 Professional, single user/single computer?

Them: Thank you for your inquiry. ZIGGY software sells for \$49.95 (USD) and can be ordered at www.ziggy/products.com. Jennifer, Customer Service.

Me: You did not answer the question asked!!!!

Them: I'm sorry, system requirements can be found at www.ziggy/products/requirements.com. Jennifer, Customer Service.

Me: Again, your response does not answer my question. I have already reviewed your web site requirements listing, and it does not address this question, nor does your FAQ area. PLEASE GIVE ME A DIRECT ANSWER!!!!!!!

Them: Yes.

Email can save your firm and your clients money. It saves on telephone expense, postage, express mail, and photocopying charges. And it can provide almost instantaneous communication. For that reason, it has become the application that is essential to every office, and has brought people to the keyboard and mouse who might not otherwise be interested in using a computer. Email seems pretty easy to use, and it is precisely because of the seeming ease that so much misuse of form and manner occurs.

Email falls somewhere between an informal telephone communication and a more formal written communication such as a business letter. Letters tend to be carefully and precisely crafted forms of communication. With a telephone call one can apply emotional context based on voice inflection and tone. But an email lacks both the emotional context of the telephone call and the care and precision of a written communication. As a result, it's easy to misunderstand and be misunderstood in email communication, and to project an image decidedly lacking in professionalism.

Here are some practices you **SHOULD** use regarding your email communications:

1. Do not include anything in an email communication you would not feel comfortable putting into a letter and mailing out.
2. Use the same "care" in generating your emails as your other written forms of communication; meaning pay attention to grammar, spelling, and proofreading, and double check to make sure your "enclosures" (attachments) are properly included.
3. Use the subject line wisely to assist your recipient to properly deal with the message now and later. Be precise and descriptive. Instead of a subject which reads "Draft" consider "Draft Release Agreement of 2/7/02 (Comments needed by Friday)".
4. If you put a disclaimer or confidentiality notice on your email, put it **BEFORE** your email content, not after. Remember, with a fax cover sheet, the disclaimer is on the transmittal cover page, so it is presumably read before the confidential documents which might be misrouted. Making your disclaimer part of your auto signature puts it after the information you wish to protect, thereby rendering it useless. So you should either type your message after your auto signature, or copy and paste your disclaimer onto the top of your email message, and then follow with the actual content.



5. Speaking of auto signatures, they are a very convenient way to ensure that your contact information is always included in your message. Be sure yours includes your name, firm name, full address, phone , fax, email address, and web site address. Also, consider including a *brief* statement of your practice area(s) and the jurisdictions in which you are licensed to practice, for subtle and repeated marketing. Avoid attaching vcards to your emails, as they can harbor viruses, and most people don't know how to properly use them upon receipt anyway.
6. Respond promptly and accurately to all emails you receive. Many users of email expect an immediate response. If they are your clients, you need to keep that in mind. But even if they are NOT your clients, know that most people who send an email expect a response. And one never knows whether they will be the clients of tomorrow, or the potential referrers of tomorrow's clients. Keep in mind the sample email exchange at the beginning of this article. Don't let time pressures rush you into responding in less than an accurate or thorough manner. Unless the email is spam, try to acknowledge and respond to all well-intentioned email. Even if your response is only a well-thought-out sentence or two, or a direction to a web address, the important thing is to be sure to respond in some fashion which reflects well on your professionalism. Ignored emails send a very poor message about you, your firm, and depending on how the email got to you, possibly your web site. Inaccurate or incomplete responses reflect poorly on your abilities as an attorney.

After all these years, fax has become so incorporated into daily law firm life, that most attorneys have developed sufficient procedures to deal with incoming and outgoing fax. That being said, there are still a couple of pointers that some firms are missing, which might otherwise improve client service.

Some firms use their letterhead for transmittal sheets, but they are second or third generation copies. Between the small print size of the letterhead masthead, and the poor photocopy quality, the recipient receives something which is impossible to decipher if they need the phone number or address. Don't make them look it up. Make sure your transmittal sheets are crisp and easy to read, in case there is a problem with the transmission. If you have DID telephone numbers, make sure your particular number is clearly shown on the transmittal sheet.

Most firms set their fax machines to automatically redial over and over, at some interval of anywhere from 1 minute to 5 minutes, often up to 99 times, before aborting an attempted send. This is a VERY poor practice. Not only is it wasteful of your telephone costs, (the initial dial-up being the most expensive part of the call), but if the number is not available the first few times, it is more likely that the number you've programmed in is in error, and therefore redialing a thousand times won't help correct the situation. However, it MAY make the person on the other end of the line (if it is a non-fax number in error) enraged, and reflect poorly on your firm.



If a fax does not go in just a few attempts, a live person at your office should pick up a telephone and dial the fax number, to ensure it reaches a busy signal, and not some poor person's office or home telephone number, which is often the case. If the line is busy, place a call to the regular phone number associated with the fax. Often there is a problem that they are unaware of, like a jam, low toner, or paper outage, and your call can promptly resolve the problem. Otherwise, you will at least know better when to retransmit if indeed their fax is tied up. Better still, you may be directed to another unpublished fax number which is available. Your clients will appreciate the extra care and service to ensure that their fax arrives as quickly as possible.

As with emails, you must respond promptly to fax you receive. That means you need to have a procedure in the office to ensure that a fax is brought to your attention promptly, and not left on the machine or buried under papers in your inbox before you see it. Then, of course, it is up to you to send a timely response.

According to the most recent 2001 survey of American Corporate Counsel Association members by Altman Weil, Inc., sixty-two percent of respondents affirmed that they have fired or were considering firing one of their law firms in 2001. Lack of responsiveness was indicated as the reason most respondents were eager to cut ties with outside counsel. These are compelling reasons to keep in mind that "the devil is in the details", meaning that it's the fine-tuning of client service, in a myriad number of small ways, which add up to superior service over-all. You cannot afford to overlook *any* opportunity to improve service, no matter how inconsequential it may seem. Sometimes it's the many "little things" you overlook which are the big annoyances to your clients.

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