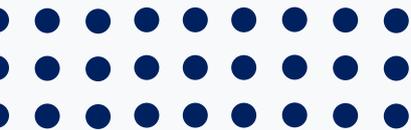


How to exceed growing client expectations

How modern law firms can successfully implement a client-focused mindset to enhance client service cost effectively



Episode 2
of the
**Build Better
Habits Series**



Build effective **client-focused** habits

For episode two of the Build Better Habits webinar series, we were joined by Sarah Charlton, CEO of Eaton Evans Morris, Gabriel Santos, national sales manager at InfoTrack, and Aftab Bose, editor of LPM. Our expert panel shared their practical tips and advice on how law firms can exceed growing client expectations by implementing a client-focused mindset and utilising technology to enhance collaboration.

The discussion highlighted the importance of understanding clients' needs and letting that shape every decision across the firm. For modern law firms to stay competitive, it's important they focus not only on what they deliver, but how they deliver it.

Our expert panellists discuss how to successfully implement a client centric culture right across your firm including defining a clear strategy, outlining what's expected, and implementing measurable performance metrics.

In this guide we discuss exactly what it means to be a client-focused law firm and how technology can help you achieve your goals. We also provide practical advice for adopting the fundamental client-focused habits that will provide financial and reputational gains.



In this guide we cover:

What a client-focused mindset is

How technology and legal software can help manage client communications

Top habits law firms can adopt to become more client-focused

Who is responsible for ensuring habits stick

Meet our panel of legal experts



Gabriel Santos – National Sales Manager

InfoTrack offers an award-winning suite of digital conveyancing solutions from client onboarding and property searches, to verification checks and property reports. Empowering law firms to complete their conveyancing tasks digitally, the solution aims to streamline and connect processes to increase productivity and profitability.



Sarah Charlton – CEO

A client-focused law firm that has a modern approach with traditional values. Eaton-Evans Morris are committed and passionate about acting for the individual and pride themselves in maintaining their reputation for approachability and effective communication.



Aftab Bose – Editor

Legal Practice Management (LPM) provide legal leaders and practice managers with key business information, tech insights and legal sector trends. Via partner-led content, events, webinars, and special reports LPM are helping modern law firms successfully manage operations.

1

What does a **'client-focused'** mindset mean?

We begin by asking our panellists what a client-focused mindset means for modern law firms, and the resounding response was ensuring that clients are at the heart of all business decisions.

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What does a 'client-focused' mindset mean?



"I might be oversimplifying this, but I think everything starts with empathy. You have to understand the reason they are communicating with you. Unless you're applying an empathetic approach and putting yourself in someone else's shoes, it's really hard to be client-focused.

"One of the things that I've learned over the years is communication is really important, but communicating in the way that your clients would expect to be communicated with. The only way you are able to do this is by wearing your client's shoes to understand what their challenges are.

"Everything that you do is for your clients. And unless you take an empathetic approach to your clients, you're not going to service up to their expectations."



"I believe there are three areas. One is the business decisions you make. It's really easy to be very solicitor focused in a law firm, to be able to make decisions to pacify the employees and staff that you have. But your decision making has to be driven largely around the clients because if you don't have clients, your lawyers don't have anything to service.

"The second is evaluating how successful you are. How many law firms that say they're client-focused service, actually are? Unless you actually ask clients and get their feedback it's incredibly challenging [to know].

"Then you have competing [business] objectives. You need to consider how you deliver your service for different clients. How much money do you spend? What technology do you use? It's important to have the versatility to be able to recognise clients' individual needs."

What does a 'client-focused' mindset mean?



"I think that the unique model that law firms have, especially in certain practice areas, is that they're not necessarily in a position to guarantee an outcome. An area of competitive advantage then shifts to either your pricing models, which is a whole different debate, or to the quality of service delivery, and that then becomes how well do you serve you clients.

"All business decisions, specifically in the tech space but also in general, on how you set up your service delivery have to begin with the client.

"An inherent part of that is, of course, the versatility. No two clients are the same, so your firm has to intrench a sense of versatility and flexibility in its operation. Tech is a big part of that, because you need a facility to treat different clients in different ways while keeping your operation and back end intact and structured. You need to have that agility in approach."

"Everything starts with empathy. Unless you're applying an empathetic approach and putting yourself in someone else's shoes, it's really hard to be client-focused."

2

How can **legal software help law firms** better manage their client communications and stay client-focused?

Technology can assist with the heavy lifting of client communications. It can provide automation and digital tools that make replying, updating, and collaborating with clients easier. Our panellists discuss the part technology plays in delivering a personal service.

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How can legal software help law firms better manage their client communications and stay client-focused?



“LPM’s annual Frontiers Report looks at the state of technology in the SME legal market. The top investment agenda for most SME law firms this year is CRM technology, after portals and remote technology, so client-focused tech is very much on the agenda.

“What’s important is firms make sure that when they do invest in that tech, that it is integrated across their systems. Make sure your CRM is linked to your PMS and your CMS. It’s really important to optimise technology properly because when integrated it means instead of just using data that helps check their billable hours and things like that, they actually get data and metrics on client delivery, service delivery.

“At the end of the day, you can invest in tech, but client communication ends up being a mindset. It’s people that have to adopt the technology.”



“One of the reasons we made the decision to progress with Osprey is because the product is very client-focused, and that has made it a little bit easier.

“We try to model ourselves on Amazon and other business that communicate well with clients, but we don’t have deep pockets like Amazon. But we use Osprey combined with other products, to replicate some service elements and it’s not that expensive.”

How can legal software help law firms better manage their client communications and stay client-focused?



“One thing we can’t forget is that technology will never substitute a human interaction. So it’s okay for you to do 80% of the communication through automated milestones and automated emails and reminders, however the human element is what’s going to make the difference.

“The role of technology is for 80% to bridge the gap on communication, but also allow that 20% human interaction to be there for their client.

“Tech’s not the answer, it’s not the silver bullet, but it will allow you to then shine your personalities and your services to your clients. This is how I see tech playing its part.”

“One thing we can’t forget is that technology will never substitute a human interaction.”

3

What are the **key habits to adopt** to ensure law firms are client focused?

To exceed client expectations and provide a competitive service our panellists discussed the habits all law firms should embrace to ensure their firm adopts a client-focused mindset and their actions reflect those values and goals. The experts agreed on eight key habits...

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Eight habits law firms should adopt

1 Define a service level agreement (SLA)

To ensure accountability across the firm, expectations need to be clear, so creating an agreement that states how you're going to communicate with clients is key, as Gab explains: "I don't see it in firms often, but when I do it's very successful, and that is setting up and abiding by an agreement of how you plan to service your clients." Aftab agrees and believes regular check-ins with clients should form part of the standard service. "What's worked well for firms is having a separate team – perhaps a customer success role – checking in independently with the client at different points in their journey."

2 Choose your value proposition

You need to consider why clients would choose you over your competitors, and Sarah suggests considering your purpose and wider business goals. For example, thinking about your sustainability and environmental impact, offering apprenticeships, and helping the local community, or becoming a B Corp firm to show your commitment.

3 Accountability

Communicate goals and service level agreements (SLAs) to the wider team and ensure they're reminded regularly of what's expected to ensure accountability. Gab believes that leadership needs to empower employees to provide a higher level of service and, "that will only happen once you set expectations and consistently communicate those to your staff."

4 Reward staff

To reinforce the behaviour you expect, it's important to reward staff for achieving goals and improving performance. Sarah says that at her firm they reward people who receive good reviews, which helps to instil a client-focused culture across the firm.

5 Align values with success measures

To help reward employees and incentivise change, it's important to measure the firm's success towards the goal. Aftab warns that current measures of success don't always align to a client-focused strategy and points out that "billable hours tend to be the measure of success, but if you pivot away from that and look at reviews and service delivery, you'll gradually move towards a client-focused team."

Eight habits law firms should adopt

6 Keep data hygienic

When utilising technology to enhance the client service it's important to ensure the data you input is cleansed and accurate. Aftab explains how quality data can be used to inform creative ways of utilising your technology, but "the opposite is true, if the data isn't hygienic, pretty much everything else will be a mess and take extra time. If you have clean data, then the potential is limitless."

7 Hire people from different sectors

Sarah says that teaching how a law firm is structured is simple but teaching people skills – like how to diffuse a difficult situation – isn't. In the roles where it's applicable, she advises to focus on hiring individuals who have a client-focused background rather than just a legal sector background, adding that, "we target people who have worked in hospitality because first impressions count."

8 Incentivise word of mouth

Feedback from your clients is invaluable, so incentivise word of mouth. Gab believes that a recommendation from a client is the best way to build credibility and highlight the quality of service. He recommends that firms, "put your solicitors' reviews on your website... and learn from the feedback to understand what is and isn't working for you."

4

Who is **responsible** for ensuring client-focused habits stick?

To end our discussion, we asked the experts whose responsibility is it within a firm to monitor and review client service. The panel had differing views on this point, but a common theme is that the mindset needs to be a priority for it to be successful.

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Who is responsible for ensuring client-focused habits stick?



“Whilst I think you could argue that it should come from the top down, I think that’s utopia land. In reality I believe you can actually spread it from the middle. I feel that culture - whether that’s time focused culture, or compliance culture or client service culture - is all about what’s acceptable and what’s not acceptable.

“Even if you don’t necessarily have the buy-in of your senior partners right from the get-go, if the rest of the business are rewarded, recognised, and the business becomes successful because you’ve become client-focused, any actions that are not acceptable from a culture perspective, people stop doing it.”



“I’m a fan of top down approach, but I acknowledge that realities are very different. It’s identifying who at the top of your organisation actually has those traits and can actually communicate and lead by example.

“What it comes down to is accountability. Making a decision: who is it that is going to run this project? Whether that is from the top, the bottom, or the middle, we all have to agree on what we want to achieve.”



“Many law firms tend to have a divide between the client facing side of things and the management of the firm. And I don’t think that divide is necessarily helping things. If the management team that are taking care of the operations were to also adopt a client-focused mindset. If management embodied the fact that everything we’re doing - whether that’s financial metrics or technology investments - has to help the fee earners serve the clients better. I think that’s a good place to instil a sense of client centricity.”



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Think client-focused:

**Discover how modern law firms
can effectively manage client
communications and expectations**

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