



THE NEW ELLIS GROUP

Monday Monday

Connecting the Dots with Karen Kaplowitz



*Helping you create and reinforce the habits of successful career building,
gleaned from my work as a business development strategist, trainer and coach*

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Avoid the Triggers that Cause Clients to Put Themselves in Play. This is a time to sweat the small stuff with clients. It isn't always the big issues like rates, or even results, which cause clients to change counsel. It is too hard to develop new relationships to let small mistakes cost you an existing relationship. You are not the only one ready to pounce at signs that a prospective client is disaffected from their current counsel. Your competitors are just as ready to make a move on your clients. Clients routinely switch lawyers when their phone calls are not returned; or a firm refuses to consider a discount or alternative fee; or the bills have errors on them; or the billing errors are not corrected; or a firm demands a conflict waiver that makes a client uncomfortable. To avoid your clients' putting themselves "in play," consider these strategies:

- Make client service an even higher priority for all firm personnel.
- Fully understand your clients' preferences and procedures.
- Integrate firm systems like knowledge management with clients' systems.
- Solicit feedback so you can jump on issues that require more handling before complaints.
- Respond to complaints immediately and do not quibble over minor issues.
- Do not raise rates without talking to clients.
- Do not take clients' loyalty for granted.
- Avoid surprises.
- Do not tell clients that you have no control over firm policies that affect them.

Example: For years, your firm has been the only firm handling work in your practice area for a significant client. The general counsel has shared that he has resisted pressure to open the work to competitive bids because of the value of your firm's history with the company. Your firm also advises the client on other matters. On a recent matter in another practice area, there was a problem. The client did not provide all the relevant facts; your firm failed to take advantage of a particular regulation; and the client lost \$50,000. You urged the firm to give the client a credit for the full \$50,000. The firm's general counsel concluded that the primary cause of the problem was the client's failure to provide the full facts and recommended that the firm just write off the fees for the matter which the executive committee did.

When your client called to say he was upset that your firm did not catch the problem to begin with or make better amends, you told him that you had urged the firm to do more but had no control over the ultimate decision of your firm's management. You were relieved when the client did not pull his work.

A few months later, the client told you that for the following year's work, he was inviting you to compete in an RFP. When you reminded him that he had resisted doing so in the past, he said the decision to put the work out to bid was out of his control. The client was in play.

Are you taking care to identify and avoid the small irritations which can cause long term valued relationships to be at risk?