



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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## How Client-Friendly Is Your Firm?

A major factor for laterals is whether their clients will welcome their choice of a new firm. The experience of clients who are thrust into new firms because one of their outside lawyers has moved is also a good index of how client-friendly a firm is. Here are some questions to consider if you are a lateral candidate evaluating how your clients may react to potential firms, or if you are a partner evaluating how user-friendly your current firm is:

- How long does it take the firm to complete conflict checks?
- Is there a department dedicated to conflict checks?
- Who in firm management is responsible for resolving disputes relating to conflicts and is that person available on short notice to resolve issues?
- Is there a welcome package for new clients offering them information about key firm policies and personnel? When laterals bring in new clients, do those clients receive a welcome package?
- Is there an administrative person who will be assigned to help each of your clients get access to firm intranets, billing systems, and other relevant technology?
- How long does it take the firm to set up new files for clients?
- Does the firm have client teams for any of your clients?
- Has the firm provided you with a list of lawyers and matters the firm is already handling for clients you also represent?
- Has the firm provided you with a list of clients and lawyers who do work for other companies in the industries of your major clients?
- Does the firm have a list of rates that you can evaluate and provide to clients?
- Is there a department in the firm which handles pricing and RFPs which can assist in connection with rate issues for clients you are bringing?
- What other specific processes does the firm offer laterals to ease their clients' experience?

**Example:** A very successful lawyer had benefited for many years from having been in just one, excellent firm. Several clients had expressed their appreciation that she had stayed put. So, when she finally decided to consider a move, she was particularly attuned to whether she would inconvenience clients. On each occasion when discussions with firms reached the stage that the firm requested that she fill out a lateral partner questionnaire [an "LPQ"], she requested a comparable list from the firm identifying which lawyers represented her clients and on what matters as well as a list of any conflicts with her clients. She also requested that the firm provide her with a list of all clients where the firm was on an approved list of law firms. She also asked to see the materials the firm provided to each new client. She ranked how "user-friendly" each firm appeared to be based on the information she collected. Her choice of a new firm came down to two firms which were offering comparable compensation and leadership roles. She ultimately chose the firm she had ranked higher on being "user-friendly" for clients.

How carefully are you evaluating your clients' experiences when they are introduced to your firm? Can the experience of clients of new laterals help you improve the user experience of the firm's clients? Can you be more competitive for talent and clients by paying attention to how you welcome new clients to the firm?