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LEGAL MARKETING

Empowering Firm Staff to Generate More Client Business

BY STACY WEST CLARK
Special to the Legal

This is the month, the year — heck — the decade of lawyers needing to deliver outstanding service to their clients. The components of great service include understanding the client's business, being incredibly responsive, communicative and accessible and looking for opportunities to make the client's life and business world better. Here is the good news: You do not have to do this alone. In fact, you should not be doing this alone.

You and your secretary, messenger, file clerk, receptionist, human resources manager, office manager, librarian and everyone on your staff who is not a practicing attorney is part of your team. Try not to think of them as your employees but rather as ambassadors for what you do as a lawyer.

The sooner you empower your staff to deliver outstanding client service, the sooner your revenues will grow. Staff who are involved in and educated about the marketing effort have higher morale and lower turnover and treat clients better.

So where do you start?

Involving and educating a staff person about the firm's marketing efforts should start at the staff member's interview for employment. At that time, a potential hire should be told by your human resources employee that his or her duties will include marketing activities and, if hired, he or she will be expected to act as an ambassador of the firm. He or she must dress, act and speak in such a way that reflects well on the firm.

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The job description should detail marketing activities. But stating it in black and white is not enough.

THE LAWYER'S ROLE

Once you have hired someone, it is incumbent on you to train your assistant on the marketing and client relations tasks that will be expected of him or her. Do not assume people come to work knowing how to help you.

Training elements include the following:

- How do you want your phone answered?
- What to do if you are in a meeting, on vacation or unreachable. How should client calls be handled?
- Who are priority clients?
- Becoming familiar with the clients and staff of clients. Who are they, and how should they be addressed? Understanding who gets top priority treatment (always or at certain times).
- Setting up Google alerts on clients to see if they are in the news.
- Becoming adept at simple Google/Westlaw research on clients and their Websites.
- Tracking key events in clients' lives (birthdays, promotions).
- Helping you schedule weekly marketing activities.
- Working with the receptionist to make sure clients and visitors are warmly and personally greeted.
- Asking you questions about cases and referral sources.
- Updating your mailing list on a weekly basis or sooner.
- Looking for opportunities to really help clients.

After this initial discussion, it is really your job to keep informing your assistant of what you are working on, the result you are trying to achieve and who the parties are. Patricia Hamill, a member of Conrad O'Brien Gellman & Rohn's executive leadership committee, points out that in this electronic age "secretaries are not actually handling papers as they used to — and thus may not have daily contact with the case. I have a daily meeting with my assistant to ensure she is up-to-speed on client and marketing matters."

Importantly, a lawyer should work with his or her assistant to go over how the assistant should describe his or her job to the public. Should he or she say, "I am a legal secretary," or "I am an assistant to a top Philadelphia lawyer who helps companies when they are being investigated by the federal government," or "I work with one of the area's top real estate lawyers who helps developers with land use and zoning issues — and, boy, is she busy!"

In addition, lawyers need to help their assistants and staff members stay up-to-date about what the firm is doing (major wins, awards, etc.) so they can promote the firm to others in their lives.

THE ASSISTANT'S ROLE

Once trained, an assistant should regularly do the following marketing/client relations activities:

• Review the firm Website to stay abreast of firm news.

• Review new client memos/reports.

• Proactively ask their attorneys questions about cases and marketing goals.

• Help schedule weekly marketing lunches.

• Calendar client birthdays, kids' names, etc.

• Review client and referral sources' Websites (especially the press section) to stay abreast of news affecting the client that can be shared with the lawyer.

• Read the local business/legal newspapers each day.

• Consider ways of ratcheting up client service.

THE RECEPTIONIST

The receptionist's role in setting the tone for your firm cannot be overstated. First, the receptionist should be professionally attired and have great care for her personal appearance. I have walked into too many law firms where the receptionist was either dressed incredibly casually, had unkempt hair or visible hair hygiene issues or didn't seem to care less that I was standing in front of him or her. Second, the receptionist must answer the phone enthusiastically every time and greet visitors in the same manner. Third, he or she should also try to learn the names of all visitors to the firm so he or she may personally greet them. Finally, the receptionist should not engage in personal phone calls when anyone is seated in the reception area.

A terrific receptionist can sell the firm over and over again. As Conrad O'Brien partner Hamill states, "Our receptionist, Pam Farrell, is loved and adored by clients and guests — and it is no small wonder why. Not only does she remember the names of clients and greet them warmly and professionally, she knows their voices on the phone before they introduce themselves — even if it has been years since she has spoken to them. Clients marvel at her and truly look forward to seeing her."

Firms who continuously make efforts to empower their staff to assist in client relations activities see results in the form of strengthened relationships with clients. Accordingly, every effort should be made, on a regular basis, to communicate news about the firm to the staff and to solicit their input for how clients relations may be improved. Some forward thinking firms have put their staff's photos and contact information on their Websites so clients can get a true picture of their legal "team." Some firms provide their staff with business cards. I think these are wonderful and important ideas that certainly should be used by small to midsized firms.

Seth Shapiro, director of administration at Philadelphia immigration boutique Klasko Rulon Stock & Seltzer, notes that the relationships the firm's secretaries maintain with their clients are critical to strong, long-term client relationships. "Our secretaries take time to make personal connections with our clients, and to know what matters they are calling about and the status of those matters. They take the initiative to get the client the information that is needed, or connect them to someone who can. It is no surprise that, at our firm seminars, the clients make time to speak with our secretaries and to tell our lawyers how much they appreciate their assistance."

So now is the time to get your back and front office in order. Empower your staff. Help them shine. You can do this. Get up, get out, get going! •