

The Legal Intelligencer

From the Horse's Mouth: What I Hear Clients Say They Want From Their Lawyers

By Stacy West Clark

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I attended an educational conference last year sponsored by the Legal Marketing Association. When I returned to my office, I quickly filed my notes away.

Well, today I pulled them out and re-read what I had heard. I realized I had gotten so many new and wonderful tips in all areas of business development from clients on the podium that you my wonderful readers should know about. Allow me to roughly paraphrase some of their advice:

Give me free CLEs, said one in-house counsel: "I love when my outside lawyers come in and provide a free CLE to my legal team at our offices. If they bring a meal, even better."

Entertain me before or after the CLE, said another: "I do not have an entertainment budget. Thus, I would suggest that a law firm wrap a CLE event around something entertaining—say a post-session dinner, a sports game or concert. I am less likely now to want to go just out for a fancy dinner with my lawyers when I can be at home with my family."

Give me advice that I can run with quickly: "As corporate counsel, my ideal responsive communication from my outside lawyer when I need advice toot suite is to receive a three to four points-bulleted email—no longer—that pointedly addresses my questions—that I can cut and copy into a larger email to C-suite executives to advise them.

Secondment me: "I like when you send me one of your lawyers to "live here" at our company as a secondment situation when possible. Your lawyer really gets to know how we make our product, who we are as a company and what challenges we face. When imbued "with us," we believe your seconded lawyer better represents our company—during their tenure here—and thereafter as well.

Help me make a deal: "As an owner of a family business and I really appreciated it when my lawyer actively tried to create deals for me with her contacts. In the past, she put me in touch with two businesses that I could do a deal with right away. I received substantial value from her being on the lookout for deals that are in alignment with our strategic goals. And, of course, when she did this, I used her for the legal work for the deal."

Help me make money: "I loved it when my New York lawyer put together a night at a private box at the ballpark and invited me and some of his other clients who I had wanted to meet and get to know for business opportunities. I found this kind



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Courtesy photo

of evening, which specifically advanced some my goals significantly, extremely beneficial, and very thoughtful.”

Senior associates—get to know me now—before the lead partner retires: “If a firm is worried that someday, I, as a client, may switch my business to another law firm, then it behooves them to make sure that the senior associate who is handling matters for me—takes me out—off the clock— for coffee, picks my brain and works hard on creating a relationship with me—off the clock. The sooner they “get me,” the better the relationship and its longevity.”

Invest in relationships—even when the client is not doing well: “Come forward with some ideas that may affirmatively help the client in good times and bad. Stay in touch. Help them with their changing situation. Remember if the relationship is strong, when and if the business closes or if there is a sale or merger, the person you have been working with will more likely follow you for legal help at their new place of employment.”

Billing is your most important marketing event, said one speaker: “Do not apprise me mid-matter that our agreed-upon budget will be exceeded. Talk to me throughout the matter so I am not surprised when I get your invoice. Do not just send me a huge bill and expect me to be fine with it. I can promise you I won’t be.”

Don’t tell me the law—just give me advice: “Clients expect you to know the law; they just want your advice on how it applies to their situation and what they should do. If you are seeing things happen in other deals that would be useful to your client in some way, share that information too.”

“I hate “broken deal” fees!” This seems easy enough to understand!

Egregious mistake: “You need to take time to understand my business, my industry, my personnel issues, my regulatory world and more.” One speaker

recounted how upset and really astounded he was to learn that his Philly law firm had given work to a huge competitor—not realizing that the matter was one in the wheelhouse of their own client’s line of business!

Don’t expect clients to read everything: “Understand that today, people scan and skim. So make sure the title of any educational communication you send me (alerts or newsletters) clearly tells me why I should spend my time reading it. Why should I care? So instead of sending me an alert titled, “Third Circuit affirmed the lower court ruling today”—I would much prefer getting something with a better title that speaks to me, like: “Pregnant UPS drivers now have rights for ...”

Labor and employment lawyers should watch episodes of “The Office” and use them as great teaching devices.

“Communicate with me the way I want: “At your initial meeting with me, ask expressly how I want to be communicated with during the representation. Do I prefer emails, texts or phone calls? What time of day is best to reach me? How often would I like to have a status update, and more? Communicate my stated preferences to anyone from your firm that will be working on my case.”

I think these comments are great intelligence to help you know how to make your clients happy—beyond just doing exceptional legal work. I have developed some “first meeting” protocols you can use to make sure you get everything started on the right foot. Let me know if you would like a copy.

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