



## Becoming Your Own Client Value Officer

Solo, small and midsize law firm attorneys tend to wear many hats. From marketing director to technology guru to chief operating officer, the number of roles that fall outside the parameters of “attorney” can seem endless. However, it is precisely this ability to shift gears, see business needs from a holistic perspective and jump in where needed that makes small and midsize firms so nimble and efficient.

Though it’s true that larger firms can be more bureaucratic than smaller firms, one thing that Big Law has done well is maximizing the client experience. This can often be attributed to a dedicated [client value officer](#) role. Nowadays, more attention is being paid to the client experience—after all, a positive experience leads to referrals, testimonials and good reviews.

Firms realize that a favorable client experience keeps a law firm running. To date, approximately [35 of the top 500 law firms](#) have a full-time, in-house client value professional. This person is dedicated to being the “client voice” in all things. Whether in firm marketing or the client intake process, the client value officer’s job is to answer the question “what would the client want?”

Then, it’s their job to make it happen.

Historically, small and midsize firms haven’t had the budget to implement such a dedicated role. But lawyers everywhere are focusing on figuring out what clients want and then delivering—[small and mid-size firms included](#). Although their budgets may not be as flexible, these firms are finding ways to implement the client value role, even if it doesn’t come in the form of a fancy, clear-cut position and title.

Already accustomed to wearing many different hats, small law partners and other attorneys in managerial roles are finding ways to become their own client value officers—whether that means taking on the responsibilities themselves or divvying them up amongst multiple lawyers. Smaller firms, sans the red tape and protocol barriers of Big Law, likely have a better chance of the firm’s attorneys [adopting the practices](#) eagerly and quickly.

### CLIENT VALUE OFFICER: THE “DIY” VERSION

You may be nodding along and thinking: “This all sounds good, but practically speaking, what does it like look to be your own client value officer?” Good question.

While achieving great results for clients is obviously [critically important](#)—i.e., deals successfully closed or cases completed to the client’s benefit—of equal importance to most clients is the [timeliness and efficiency](#) of the communications and service delivered throughout the relationship. Think phones answered promptly, questions answered quickly and legal matters dealt with empathetically. It’s these little things that can easily fall by the wayside in busy seasons. If firms want to up their client value game but need to do so without breaking the bank, it’s important to list out the goals that can reasonably be reached and then find ways to incorporate them into existing processes or roles.

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Most lawyers know that it's deeply important to implement a client feedback system so that you can find out how your clients are feeling about the services they receive. This is the number one key to a successful client value program. Whether the feedback process happens digitally or in person, and whether it's implemented by every attorney or just one staff member, it's critical to gather this information from clients to gain an understanding of what their experience was like, and then turn that feedback into real firm-wide changes.

Besides implementing a client feedback system, below are some other ideas that, though not ground-breaking, can make a huge difference when it comes to the client experience. As you mull these over and think of your own ideas, try to mentally map out how these could be integrated into existing processes or roles.

#### Client Value Goals:

- Develop [accurate cost projection](#) processes—even if that means investing in pricing technology that can evaluate variables driving costs.
- Anticipate upcoming client needs by suggesting available firm value-add services.
- Make sure phones are answered quickly, panicked clients in the middle of a legal matter don't appreciate holding on the line.
- Offer alternative pricing structures. Some clients like being billed by the hour, while some feel more comfortable with a fixed fee. Of course, a fixed fee is not possible for every project—but find the projects that you can be more flexible on and offer fixed fees where appropriate. Or perhaps consider implementing [subscription-based billing](#) options for eligible matters, a practice that's becoming increasingly popular.
- Answer client questions as quickly as possible. Make a firm-wide policy for how quickly clients can expect to get an answer. Whether that be five hours or 24 hours, make sure clients know what to expect.
- Work to understand each client's business as a whole, not just the matter at hand. If you don't understand the big picture, it's easier to miss something that could prove detrimental down the road. Plus, when you understand the client's business holistically, it's much easier to see places where the firm can jump in on other matters. If necessary, develop a broad list of probing, open-ended questions and distribute it to attorneys to use in client intake meetings.
- Lastly, but most importantly, treat clients how you would want to be treated: speak to them kindly, listen to hear rather than listening to respond, and be respectful in all interactions. Remember that most clients needing legal assistance are likely in uncomfortable situations—a little empathy will go a long way when it comes to the client experience.

## A WORTHWHILE PROJECT

No matter your budget, there are ways to make sure the client has a smooth experience from start to finish. You may have to map out some goals and distribute them amongst staff, or implement them into existing processes, but in the end, all your efforts are likely to pay off—hopefully in the form of repeat clients and raving reviews.

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