

Customer Management Tips that Earn Trust and Referrals

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EARNING TRUST AND REFERRALS

Client Satisfaction

- Starts at the potential client stage
- Should be nurtured throughout representation
- Can be truly assessed at the conclusion of representation and beyond

If clients have a great experience with you, they will return—or ask you for referrals if the matter is out of your wheelhouse.

Client Satisfaction is a Key Indicator to Success

Whether you are a solo, a small firm, or in another situation, if you are a lawyer, you are you are in a service industry. People come to you in times of crisis; they don't just see you as their lawyer. People see you as a trusted confidant. Just listening is so important; make your client feel heard and comfortable.

Great client experiences lead to great reviews—and recommendations.

Recommendations

Recommendations garner “warm leads”—potential clients who have already learned about you and your work from word of mouth.

- 62% of consumers ask friends and family for recommendations when they are looking for a lawyer. — *CLIO's Legal Trends Report*

Reviews

Reviews impart information about you and your work to potential clients who don't know you.

- 68% of legal consumers consider ‘reviews from former clients’ as one of the most important pieces of information when hiring an attorney. — *LawyerMarketing.com*
- Potential platforms for client and peer reviews: Yelp, AVVO, Google My Business, Facebook, your own website, and so on.
- You can ask satisfied clients to post good reviews of your work online, or to give you quotes you can use on your website.

Earning Client Trust and Referrals — The Three Cs

Ethical lawyering is basic good practice—and the basis for ensuring client satisfaction. Underlying ethical lawyering are the all-important Three Cs—which also happen to be the secret to satisfied clients. They are:

- Competence
- Confidentiality
- Communication

Competence

People coming to you are often out of their comfort zone—and frightened. They rely on your competence to lead them through a crisis.

“A lawyer shall not intentionally, recklessly, with gross negligence, or repeatedly fail to perform legal services with competence.”

– California State Bar Rule 1.1



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Confidentiality

If a client comes to you via a referral, let the referrer know that you will not share their information with the new client, and visa-versa. This puts clients at ease, as they are often sharing very sensitive information.

In your agreement, you can ask clients for permission to share just the facts of their case (omitting names and identifying details) with lawyer colleagues, so you can confer on complicated cases. This is especially important for solo attorneys.



“(A) A member shall not reveal information protected from disclosure by Business and Professions Code section 6068, subdivision (e)(1) without the informed consent of the client, or as provided in paragraph (B) of this rule.”

- California State Bar Rule 3-100: Confidential Information of a Client

Communication

Most disciplinary cases filed with the State Bar are related to communication.

The rules can be vague. We have an opportunity to be proactive about communicating fully with clients to increase satisfaction and enhance the client’s experience—from start to finish.



“A member shall keep a client reasonably informed about significant developments relating to the employment or representation, including promptly complying with reasonable requests for information and copies of significant documents when necessary to keep the client so informed.”

- Rule 3-500: Communication

Trust and Referrals

To make your work life more enjoyable—and your client’s experience more enjoyable—challenge yourself to view the rules of professional conduct as opportunities.

It’s an opportunity to be a better lawyer and serve clients with excellence rather than approaching these rules with a fear-of-discipline mindset.

That is—how are we **proactively** going to:

- Be competent
- Protect client confidentiality
- Communicate

—all to **enhance the experience** of our clients and to best serve them—versus avoiding a State Bar complaint?

The rules give us an opportunity for:

- **Control.** One of the pros of practicing law solo or in a small firm is that we have a lot of control over what kinds of cases and what kinds of clients we take on.
- **Clarity.** We can identify our values in relation to our practice—what we will do and what we won’t do.
- **Client Attraction.** When we are clear about our values, we attract certain types of clients—the clients we want, which means that our experience will be more enjoyable, and the client’s experience working with us will be more enjoyable.



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COMMUNICATION AT KEY POINTS EARNS CLIENT TRUST AND SATISFACTION

Satisfaction starts from the very beginning.

Potential Client Stage

The more communication, the more both you and a prospective client can determine if this is a good fit. And don't forget to include how timing might differ from pre-COVID times, if the prospective client has been referred by a former client. Communicate up front to avoid disappointment and dissatisfaction down the road.

- **Greeting.** When a potential client reaches out, how are they greeted, ARE they greeted, by whom, etc.?
- **Treatment.** How are they treated—do they feel welcomed?
- **Assessment.** What are the client's needs—not just legally, but emotionally and communication-wise?
- **Understanding.** Do they feel heard and taken seriously (is information gathered)? Will you let them know you are taking care of their matter? Will there be a confirmation email or letter?
- **Communication.** Are they told about any consultation fees, etc.? When is payment expected? How much of your time can they expect with a flat fee agreement? Will there be in-person or Zoom meetings? What about timing? Be upfront. Nobody likes surprises.

Client / Representation Phase

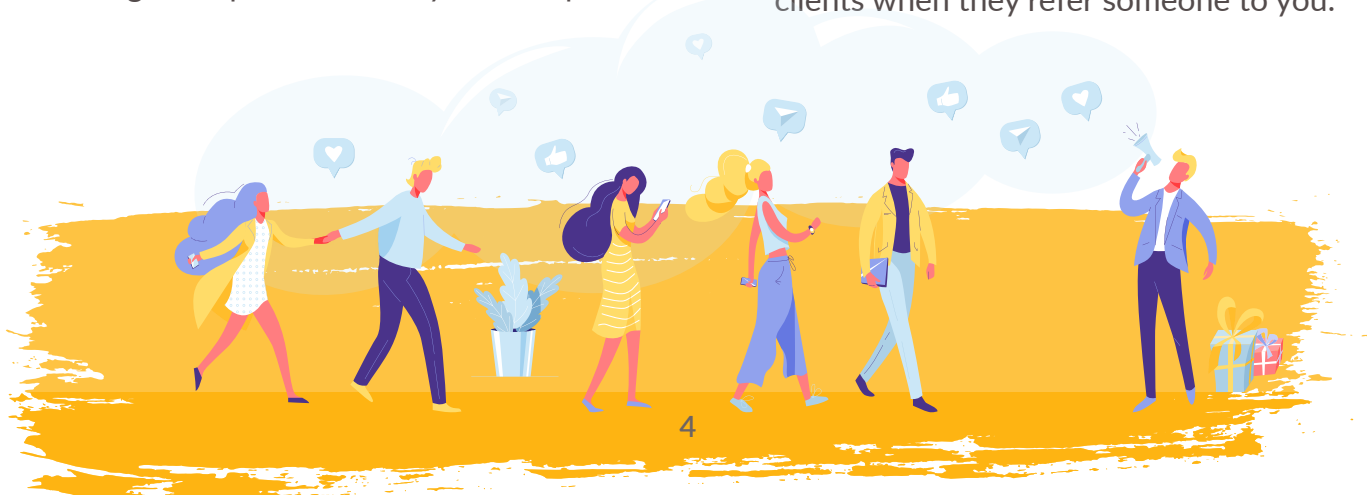
Once you engage and finalize an agreement, get started and keep the process moving forward.

- **Start Right Away.** This makes a client comfortable and makes for a positive experience.
- **Communicate.** How are you going to communicate? Are you going to call, email, text, use snail mail? Keeping your clients informed can keep them happy with you, no matter what's going on with the case.
- **Take the Extra Step.** For instance, in court cases, once you've filed, you can tell your client you've filed, the case number, and the hearing date. It helps the client to know you're moving forward.

Beyond Representation

When you represent a client, you build a relationship that can be ongoing—and may include follow-up work as well as referrals.

- **Invest in Your Future.** Referrals and word of mouth don't always come right away. These things take time.
- **Spread the Love.** Even if you can't take on referred cases, you continue to build relationships by providing referrals to other attorneys when satisfied former clients recommend you.
- **Circle Back.** Don't forget to thank former clients when they refer someone to you.



COMMUNICATION AT KEY POINTS EARNS CLIENT TRUST AND SATISFACTION

Earning Trust and Referrals

Do not underestimate the importance of:

- Respect
- Kindness
- Humility

Use the golden rule with your clients AND your colleagues. A small favor given will often be repaid in surprising ways.

Put yourself in your client's shoes. They come to you in times of crisis. They may be afraid of the legal system and of being cheated. They may be nervous. They need help and are relying on you. It may help to ask them "what's your biggest fear about this matter?" Then talk them off the ledge.

Reassure them. Give them information. Be kind.



See **Teresa Gutierrez's** webinar, **"Customer Management Tips that Earn Trust and Referrals"** at ceb.com/resources/webinars



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