

Identifying and Meeting Client and Lawyer Needs

By Sandra J. Boyer

To be successful and happy in the practice today, lawyers must find a way to develop a meaningful practice which will insure they remain comfortable as the profession changes. One of the most important aspects of being an attorney is to ensure you meet the needs of your clients. Attorneys who don't understand their clients or the needs of their clients fail to build a working relationship that will meet both client and lawyer needs.

Clients are looking for many things from their attorney but among the most important attributes are: 1) timely services, 2) an understanding of the strategy and steps to be taken during a specific assignment, 3) constructive legal advice from knowledgeable lawyers, and 4) regular communications.

To insure you meet client expectations for timely services it is important to be realistic when estimating the amount of time it will take to complete the project. In many cases, overestimating the amount of time will help to insure the project is completed on time if not early. The last thing a client wants is to have the project take longer than estimated. If it does, meet regularly with the client to insure they understand why it is taking more time and provide another estimate of time.

To insure your clients understand the strategy and steps to be taken during a project, partner with your clients. Explain the procedures you will be taking during the project. Get their input - keep them involved so they understand why and how you will be performing the services. Clients today are not as loyal as in years past, they will shop around for the legal services they feel will best meet their needs. In order for them to make effective decisions, they must understand what the project will entail and how the lawyers plans to attack the project. They must feel as though they are part of the process. If they participate in the process, usually they will buy into the strategy and not question the bills associated with the work to be done.

Clients don't base their decisions regarding legal counsel solely on the costs involved. Clients are looking for constructive legal advice from knowledgeable lawyers. They want and expect the quality and skills you have promised at your initial meeting. Be sure they understand your qualifications - then meet the promises you have given to the client. Not only is this essential to gain new clients, but to maintain current clients. Word of mouth is still the most effective marketing tool for lawyers.

Communications, communications, communications!! Clients want to hear from you regularly. No exceptions. They want their phone calls returned. No exceptions. Keep them as a member of the team by keeping them involved.

While meeting client needs is the most important function a lawyer can perform. It is

also essential for the needs of the lawyers to be met. In order to maintain a quality of life in the legal profession today, lawyers must feel that their needs are being met as well. Lawyers are looking for; 1) clients who pay promptly, 2) interesting and challenging legal work, 3) available resources to perform quality legal services for clients, 4) policies and procedures which assist lawyers to practice effectively, efficiently and profitably.

Austin and I work with many firms across the country. What we have found is that lawyers are not only interested in making more money. They are also interested in maintaining a client base that benefits their practice as well as the Firm. However, as part of the practice they must identify and attract clients who will pay the bills. Clients who understand the procedures and the goals and who are regularly communicated with - are more likely to pay for the services being provided.

In order to find good cases and good clients, you must first identify what type of client you want to work with and what type of work you want to perform. By defining these needs up front, it is easier to find the clients who will provide you with interesting and challenging legal work. You should not feel that you need to take in every piece of work that comes your way. This can lead to unhappiness in the practice because it is not the work you really want to do. It can also lead to low profitability if the client is not able to pay because the financial health of the client wasn't determined up front. This is where an effective client selection process is essential. More and more firms around the country are implementing this process to increase profitability.

Technology, skilled support staff, research capabilities, and other lawyers who can assist with the effort are a few of the resources lawyers need in order to perform quality legal services for clients. Effective management can help meet your needs in this area. Understand and utilize technology to increase the efficiency of your practice. Define and implement a support staff hiring process, insuring that new employees meet your needs. Understand, invest in and utilize effective research tools. Define and implement an effective associate recruitment, orientation and training program to help insure your firm has the depth of professional staff needed to meet your needs as well as your clients needs.

Policies and procedures which assist lawyers to practice effectively, efficiently and profitably are developed and implemented through strong management and administration. This will allow you to practice law rather than spending an inordinate amount of time managing the business.

In summary, the secret to happy clients and happy lawyers is the ability to meet the needs of both clients and lawyers. Keep these five strategies in mind as you as you move forward in your practice:

1. Implement effective client selection policies and procedures
 - a. Determine the clients you want, then follow effective procedures to get them and keep them.
2. Price the Service so the Client will Pay and the Firm will Profit

- a. Understand what the client wants, determine what it will take to meet their needs, then meet their needs so they will pay for services rendered.
3. Consider Alternative Billing Methods
 - a. Not all clients are the same, not all cases are the same, should the same billing method always be used? Maybe - maybe not. Consider alternatives.
4. Determine How and When to Bill
 - a. Effective billing guidelines will allow the firm to bill regularly and consistently.
5. Insure Communications Between Client and Lawyer
 - a. Regular communications is important - no exceptions.