

Client Journey Mapping: Directions for Success

The [Marketing Partner Forum](#) annually provides senior legal marketing and business development leaders, and firm client development partners and rainmakers, with sophisticated and rigorous programming about critical trends that affect the business of law. One session at this year's conference brought particular attention to a valuable exercise: client journey mapping.

Client journey mapping is the process of analyzing all the steps a client, or customer, takes before and during your relationship. A focus of this analysis is recognizing what the client needs at each stage so you can help them progress to the next. Stages include awareness, the sales process, delivering service, closing the matter and deciding what's next after the matter is finished. By mapping the client journey, firms can be better prepared to give the client the information and service they need to remain loyal.

Moderated by Jennifer Schaller, managing director and co-founder of the *National Law Review*, the session featured four panelists from firms of all sizes who offered anecdotes and insights about client journey mapping and how to use it to improve and deepen client relationships.

According to panelist Adam Severson, chief marketing and business development officer at Baker, Donelson, Bearman, Caldwell & Berkowitz, PC, "Client journey mapping is the new buzzword for how to manage client relationships, with more tools, techniques and resources." He noted that a firm that only focuses on one or two stages of the client relationship is missing out on key opportunities to be the client's trusted advisor.

Determining Which Factors Impact Client Satisfaction

The panelists discussed findings from the [AdvanceLaw GC Thought Leaders Experiment](#), in which 30 general counsel participated in a study to better understand which behaviors and practices have the greatest impact on client satisfaction and lead to the strongest relationships.

The experiment showed that both [efficiency and solutions focus decrease](#) when the client relationship hits between two and five years, and that solutions focus is the number one factor correlated with a client's likelihood to recommend counsel. Given these data, firms would be wise to do critical self-examinations during this vulnerable period.

"What is powerful about data like this is it dispels anxiety and angst to have to come in as the cheapest or that the outcome always needs to be great," said Alex Macdonald, chief client value and practice management officer at McCarter & English LLP. "This tells us that the data actually says something different, so maybe we need to refocus our



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approach. It's incredibly compelling information that helps me push dialogue in the firm."

DLA Piper's Client Retention Study

Referencing a DLA Piper study that looked at factors influencing client retention, Renée Miller-Mizia, chief marketing officer at Dechert LLP, thought it was interesting to see how [DLA Piper sought to learn more](#) about how to use data analysis to reverse their client loss. The firm partnered with Axiom Consulting Partners to develop a plan that included reviewing and analyzing four years of data and 7 million records, building a predictive model to drive growth, and focusing on key variables (such as size of team, introducing new team members and experts, etc.). Critical to this effort was buy-in from the partners, who were held accountable.

DLA Piper's analytics approach to improving client retention is considered a success. When comparing a control group to a group focused on four key variables that positively influence outcome, DLA Piper was able to prevent 85 percent of fee loss on a year-over-year basis while increasing revenue by more than \$37 million.

"If you know you are in a relationship in the two- to five-year zone, it might be worth looking at what the composition of your team has been and the way in which you are working with the client," said Miller-Mizia.

Importance of Client Communication

All of the panelists agreed that strong and frequent [communication](#) remains a key factor during all stages of a client relationship.

"Ask questions," Miller-Mizia stressed. "Learn what is important to your clients early in the matter or relationship. This takes a line and turns it into a circle. Maybe you wouldn't have won the next matter if you hadn't asked the right questions early in the relationship. Be curious!"

"There are clear lines to ethics conflicts, but certain business conflicts can be subjective," said Susan Lee Hollender, chief marketing and business development officer at Michael Best & Friedrich LLP. "We have to train partners to think differently, that it's not so black and white about business conflicts. We do a lot of training and coaching trying to change minds of how partners or originators look at what is 'theirs.' They will say, 'That's my client. We can't work on that.' Their assumption is that the client won't like it. But how do you know if you don't ask?"

Last year, Severson began working with teams on developing client personas, a straightforward document that collects known information about a client in nine categories, including goals, personality and challenges. He says it's an important tool that reinvigorates client team efforts, helps them better understand their clients and gets them to think differently about the relationship. According to Severson, "It's important to always ask: What do we know; what do we not know?"

"We train our lawyers that there are questions that clients ask of themselves at each phase," Severson continued. "After a matter closes, the client will think, 'How did I feel

about that? Did I feel good about it? The legal result might be good, but how was our relationship with the attorneys? Do I want to do business with the firm again?"

Severson coaches attorneys to think through the client journey stages and how the client feels at each point along the journey. "Do something as simple as sending a text on Thursday afternoons to a client who values family time to ask "what can we take off your desk so you can enjoy the weekend." Such gestures don't always translate to a lot of extra work, he says, but if all lawyers thought that way, it would make a bigger impact on the relationship.

In the end, communication has to be a two-way street, the panelists agreed. The GC Thought Leaders data show that having a regular practice of obtaining qualitative feedback that clients can deliver to a firm **correlates with significantly better performance**.

Client journey mapping serves as a guide and focused reminder about the importance of firm-client relationship building and opportunities to improve these relationships. Is your firm planning a similar exercise in 2020?

If you have questions, or want to continue the discussion of client journey mapping, leave a comment or reach out to me, Vivian Hood, at vhood@jaffepr.com.