

Experience is Everything – Why Focusing on Client Experience is Critical and How to Get Started

You have probably heard countless stories about how the pandemic has forever changed the legal sector. From remote and hybrid working environments to desperately needed technology and security upgrades, things are undoubtedly different. One of the shifts with the most impact in the marketplace involves the way client expectations have drastically changed.

Client expectations have been changing for some time; however, like many things, the change accelerated over the last two years. In fact, [Talkdesk](#) reports that most customers have higher expectations than before the pandemic. Perhaps the intersection of the pandemic with the rise of digital natives as decision-makers created the perfect recipe for increased client expectations. The shift could also be a result of clients becoming increasingly comfortable with digital technologies and self-service options in a remote world.

Whatever the hypothesis, today's clients expect service to be exceptional, tailored, immediate and – most importantly – simple.

It is easy to brush off these new client demands as something expected from companies like Amazon or Apple. However, one could argue that the slick interfaces and elegant consumer journeys of our favorite e-tailers have changed client expectations across the board. In fact, a report from [Salesforce](#) found that 62% of customers say that their experiences from one industry influenced their expectation of others. Today's clients now expect interactions with their lawyer, accountant and consultant to also be streamlined, digital, and to require minimal effort.

In this marketplace, one thing is abundantly clear: To remain competitive, you must adapt. So how can you adapt in a way that meets the increased expectations of today's client? Focus on client experience.

What exactly *is* client experience?

Client experience, also known as customer experience (or CX), is the sum of a client's interactions with your firm and their perceptions based on those interactions. Client experience begins at the first exposure to your firm, via an advertisement, web search or chat with your front desk, and continues through the resolution of the matter or final consultation.

CX, a [\\$10 billion+](#) industry, has been a popular focus with consumer brands and



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corporations for decades. More recently, the customer-centric lens has shifted to professional services and has become an area that firms must embrace if they want to increase client retention and grow.

Still skeptical? Consider these data points:

- 73% of consumers say that good CX drives their [buying decisions](#)
- 94% of consumers who give a company a "very good" CX rating are likely to [refer the company](#) to others
- 32% of consumers say they would [stop doing business](#) with a brand after one bad experience
- New client acquisition costs [15x more](#) than retaining a current client

Building your CX foundation

Establishing a CX foundation doesn't have to be complicated. A great place to start is with a healthy understanding that a CX program is a long-term investment, not a one-and-done activity. Building your CX foundation should include:

- Understanding your current state by mapping your client's journey and gathering the voice of the customer (VoC).
- Assembling CX champions throughout your firm to be the ambassadors of change, ensuring that decisions are made with clients at the center.
- Setting a long-term CX strategy that uses KPIs or metrics to track your progress.

Understanding your current state

Client Journey Mapping

What is it like to work with your firm? Do you understand every step of that journey? Are new clients coming in through your website? What is involved in your intake process? How do clients get status updates? Do clients get frustrated with your billing process?

Every tiny interaction mentioned here, along with many more, make up the client journey. A deep understanding of your client's journey is critical to building your CX foundation. You can start by mapping out the client journey with sticky notes and a whiteboard, a free online template, or one of many digital applications. When complete, a client journey map will include a visual representation of every touchpoint your client encounters when doing business with your firm. Regardless of the method, customer journey mapping should include internal feedback from cross-functional teams at your firm, as well as direct client feedback.

Collecting VoC

What do your customers think about you? Have you asked them? Do you update processes or offer new services based on input from your clients? Do you ask your clients open-ended questions about their satisfaction with your firm? If the answer is no, it's time to start asking. According to a whitepaper by Case Status, [The High Cost of Low Client Satisfaction](#), "It's better for your client to tell you that they are unhappy with your service before they tell the world that they are unhappy with your service."

Gathering VoC may seem daunting; however, there are many ways to capture this goldmine of data. The key is to ask – then document or organize the feedback and actually implement change. Do not begin a survey campaign or client interview project if you are not dedicated to making improvements, updating processes or offering new services based on this feedback.

The initial feedback you receive in your current state phase is incredibly valuable, but it doesn't stop there. You will need to implement a feedback mechanism in your long-term strategy for continued insights. In his book, *The Client-Centered Law Firm: How to Succeed in an Experience-Driven World*, Jack Newton argues, "Being client-centered means staying focused on what type of experience your clients actually want and need and treating that as your North Star."

Assembling your team

Creating Your CX Council (CXC)

Embarking on a law firm CX journey without a solid team is a mission destined for failure. To set yourself and your firm up for success, consider developing a CX council (CXC). Think of the CXC as your governing body that will define your unique CX program, make decisions, analyze data and implement change.

In the section on client journey mapping, I mentioned the importance of gathering feedback from cross-functional teams at your firm. The same ideology applies when creating your CXC. Your clients interact with many people across your firm from many disciplines. Your CXC should mirror this structure with a mix of partners, associates, operations, marketing, paralegals, billing and anyone else in a client-facing role. You are not simply managing a project – a successful CX program includes a long-term strategy and a firm culture rooted in customer-centricity.

Mapping your strategy and measuring for success

Design and Execute

There is no one-size-fits-all template for client experience programs. After assembling your team and understanding your current state, you will need to develop your short- and long-term strategy plan, as well as define metrics, goals or KPIs that will help you track your progress.

The findings from your current state phase will help your CXC understand high-level client pain points and prioritize the focus areas for your strategy. This is where the real work begins. For example, if your VoC interviews uncover a billing process issue, you will need to work as a CXC to come up with potential solutions, test those solutions and get feedback. If you choose to implement a change in your process, it is important to adequately manage the change by communicating it both internally and externally. For each area of improvement that you prioritize as a CXC, you will need to repeat these steps.

Continued Feedback and Measures for Success

A critical piece of your long-term strategy should include a continuous feedback process.

Client feedback about your firm is an ongoing effort, so gathering this valuable information will continue to feed your CX engine for years to come. This process can include an ongoing cycle of client interviews or incorporate one or several sentiment-scoring mechanisms such as [net promoter score](#), [customer satisfaction score](#) or [customer effort score](#). Your choice of sentiment scoring will depend on your goals as a firm. The most important thing to do is to get started, establish your benchmarks and track over time.

It's no secret that a CX journey is one of a thousand miles, but the most important thing you can do on your journey to becoming a client-centric firm is to take that first step.

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