

first4Lawyers 



**For whom the bell tolls**  
The customer service imperative

# Legal services: customer service by numbers

20%

Only 20% of clients had been asked what they thought about customer service by their law firm

*YouGov Sixth Sense Legal Services survey 2012*

91%

91% of unhappy customers just never come back

*Marketing Metrics*

41%

41% of consumers expected a response to an email within 6 hours of sending it

*Forrester Research*

7

It takes 7 contacts or touches before a prospect will trust you enough to say 'yes'

*The Marketing Rule of 7*

35%

35% of law firms took more than 2 days to respond to a website enquiry

*Shopper Anonymous 2016*

26%

Only 26% of law firms use online feedback sites to gain client feedback

*First4Lawyers survey August 2016*





71%

71% of firms have service standards for client handling – 29% have none

First4Lawyers survey August 2016

89% of customers have an improved opinion of businesses that remember previous interactions with them

Thunderhead 2015

89%

10%

Fewer than 10% of firms factor interpersonal skills into their staff recruitment criteria

Professor Ian Cooper

Only 17% of law firms publish their prices

Legal Services Board 2016

17%

41%

Only 41% of law firms have given fee-earners customer service training to help them do their job

First4Lawyers survey August 2016

45% of law firms never responded to messages left and 5% didn't have an answerphone

Shopper Anonymous 2016

45%

61%

61% of firms try to better understand their customers but recognise they still have some way to go

First4Lawyers survey August 2016



## Introduction

Welcome to our special report on the customer experience.

This is still an alien term to many lawyers, but the days of screwing your nameplate to the wall and waiting for clients to troop in off the street are a fading memory. In a market with more than 10,000 law firms, and innovators aplenty looking to disrupt the status quo, you have to fight for work like never before.

So it is all very well getting the phone to ring or email to ping, whether by using First4Lawyers or any other method of marketing, but you then have to prove to potential clients that they should instruct you. In our experience, many solicitors still have a long way to go on this, despite the obvious business imperatives to prioritise it.

As our report explains, there is very good reason to address this issue. The regulatory agenda is pointing very strongly towards forcing greater transparency around lawyers' fees and quality markers with the aim of helping consumers looking for legal advice and more generally to encourage them to shop around more.

So I am very grateful that lawyers and marketing experts from a range of backgrounds have contributed to this report. They show that there is actually a lot of intelligent thinking permeating the legal market and a lot of relatively simple things lawyers can do to improve how their clients and potential clients perceive them.

I am particularly pleased that Professor Ian Cooper has given up his time to outline his thoughts on how customer service is the "ultimate business development tool" for lawyers.

I hope you find this report both interesting and useful, and we would love to continue the conversation with you. We have set up a LinkedIn group called the Legal Marketing Network UK and you would be very welcome to join it. To discuss anything arising out of this report further, please contact me directly at [Qamar.Anwar@First4Lawyers.com](mailto:Qamar.Anwar@First4Lawyers.com)

**Qamar Anwar**  
Managing Director, First4Lawyers

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# For whom the bell tolls

## The **customer service** imperative

**T**here is yet another new reality coming to the legal services market – transparency. Solicitors will no longer be able to hide behind the difficulty and mystique of the law, because regulators will not allow it. Change is coming, and it's coming soon.

The evidence is the Competition and Markets Authority's (CMA) interim report on the legal services market, published in July.

Though it found high levels of consumer satisfaction with the quality of legal services, there was less happiness with the way in which they were delivered.

Another recent survey, this time commissioned by the Legal Services Consumer Panel, illustrated the gap. For example, while 91% of people were happy with the outcome of their conveyancing transaction, only 77% of people were satisfied with the service they received. Similarly, 85% overall were happy with their outcome, but satisfaction with value for money lagged behind at 61%.

The LexisNexis annual Bellwether report has even more starkly isolated the "perception gap" – in 2015 it found that although 80% of lawyers at small firms rated their services as 'above average',

only 40% of clients rate them that way.

Where the law is falling down, according to the CMA, the panel and – agreeing with them both – the Legal Services Board, is that it is hard for consumers to shop around for legal services, to find the good providers and avoid the bad ones, because there is simply not enough information out there by which to judge them. This is a core part of a well-functioning market, in their view.

The answer, therefore, will be to improve information provision. The CMA said options ranged from requiring providers to publish 'average' prices to issuing guidance on best practice principles for transparency. "In addition, we are also exploring options on improving transparency on service quality, for example, through the publication of consumer feedback and complaints data." Its final report, where it will firm up these recommendations, will be published by the end of the year. Have no doubt that they will be implemented.

Lawyers will scoff at much of this – the reaction to the idea of publishing 'average' prices has been one of derision, a measure to be implemented by the Ministry for Measuring the Length

*Although 80% of lawyers at small firms rated their services as 'above average', only 40% of clients rate them that way*

## For whom the bell tolls – The **customer service** imperative

of Pieces of String.

The CMA recognised that there were “inherent difficulties” in signalling quality directly, with most consumers relying on previous experience or personal recommendations.

But it was undeterred: “This is unlikely to drive effective competition and may make it more difficult for new providers to compete. Mechanisms for signalling quality indirectly through reputation, either through consumer feedback or through developing brands, are currently not widely used in this sector.”

There was also a lack of digital comparison tools and those that were trying to break into the market told the CMA that “many legal service providers do not see transparency in pricing or consumer feedback as in their best interest”.

As a result only a minority of individual consumers (22%, according to CMA research, and lower for SMEs) compare providers before choosing one.

“This may reduce the incentives for providers of legal services to compete. This lack of competition may mean some providers are able to charge higher

prices when substantially cheaper prices are available for comparable services.”

In short, the failure to provide a proper service will no longer be a matter simply between lawyer, client and maybe, if things go really wrong, the Legal Ombudsman. The Internet age has started to do this anyway, through the ‘Wild West’ of sites like Solicitors from Hell, but now regulators want a more ordered (and presumably less inflammatory) way of making public the quality of what lawyers do. Just a smattering of firms have signed up to independent consumer review sites such as Trustpilot and Feefo.

And don’t expect regulators to stay above the commercial fray. When a new comparison service launched at the start of August, both the Legal Services Board and the Legal Services Consumer Panel tweeted their best wishes to the venture.

### **No return to the old days**

So there can be no return to the days when law firms could simply take customers for granted. Not only is there a growing number of alternative providers

## Encouraging signs

A snapshot survey conducted by First4Lawyers showed that there is certainly a willingness among law firms to improve their focus on the customer journey.

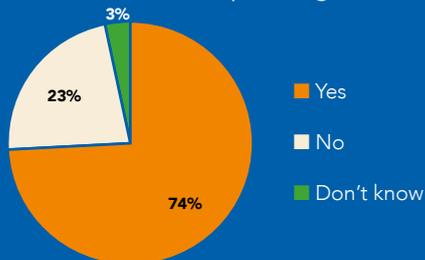
Some 71% have agreed service standards for dealing with clients – such as setting out timelines by when a client should be called back – while three-quarters of those who took part sought feedback from clients after their matter is complete. The use of independent online feedback services, such as Trustpilot and Feefo, is also on the rise, with a quarter of respondents saying their firms are signed up to one.

Encouragingly, 42% said their fee-earners received customer service training to help them do their jobs and this was reflected when asked about the overall attitude towards the customer journey.

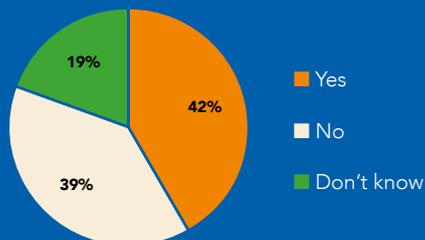
Nearly a quarter of firms have mapped out from start to finish all of their interactions with customers and have a communications plan for each stage. The majority (61%) were not so well advanced, saying that while they tried to understand their customers better, they recognised that they still had some way to go.

The rest (16%) were not bothered, however. For them, it was all about the volume, getting work in and done.

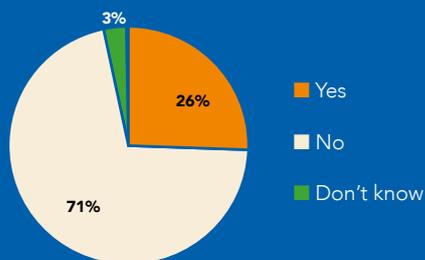
Does your firm seek feedback from a client after completing a matter?



Have any of your fee-earners received any customer service training to help them to do their job?



Does your firm use any online feedback sites, such as TrustPilot or Feefo to gain feedback?



Which of the following best describes your firm's attitude to understanding the customer journey?



Source: First4Lawyers survey, August 2016

predicated on upping the standards of customer service, but also the changes in the behaviour of retailers and other providers of goods and services in recent times have had an indelible effect on consumers' expectations (and let us not forget that they are called legal services for a reason).

The business case for creating a satisfying customer experience is well known: happy customers spend more and return again and again. It costs far less to keep an existing customer than acquire a new one. By contrast, unhappy customers spend less and are twice as likely to shout about their experiences as happy ones.

Improving customer service is not a silver bullet and cannot on its own change the context in which a business operates. Nor can it alone make a poor law firm good, or a mediocre firm great. Ultimately, high-quality legal advice is what will determine its reputation for competence.

Nonetheless, the way customers feel when they purchase services, regardless of the outcome of their legal matter, will dictate their future behaviour. If they feel the firm was on their side, even if the outcome of their case was not optimal, they will return and recommend the firm to others.

There are many things that law firms can do to improve the client experience – or, in retail language, what is known as the 'customer journey' – from their first contact with a firm right up to the post-matter relationship, which will hopefully be long-lasting. The most innovative law firms know their lawyers do not have the time or skills for this, so they invest in specialists from outside of the law to focus completely on the subject.

The following pages will analyse in detail the context in which law firms operate and the arguments for good customer service as making business sense. There follows some wisdom from innovative, customer-focused professional services businesses whose examples offer a guide to making your business more responsive to its customers. Not only should your bottom

line improve, but you will help shield your business from disruptive changes to come.

### **Legal services: the context**

It goes without saying that most law firms nowadays face greater competition, pressure on profit margins, and increasingly demanding clients. The position of solicitors in a competitive legal services market is not helped by the fact there are so many of them, with more coming on stream all the time. More than 10,000 law firms vie for work, among them over 500 ABSs, and the number of solicitors in practice continues to rise – it was over 130,000 at the last count. The statistics give substance to the adage that 'if you don't give customers what they want, someone else will'.

Despite the competitive context, legal services providers have not sought to differentiate themselves by providing clear tariffs of fees so customers know exactly what to expect. While many have moved to fixed fees, just 17% publish prices online, which the CMA said was "limiting the ability of consumers to drive competition".

The Law Society's report *The Future of Legal Services*, published at the beginning of 2016, foresaw a number of other threats to solicitors' firms in the near term: "Solicitors who can reach out to help consumers clearly understand their issues and options, and market themselves as such, should do well as more providers enter the market and confusion around choice grows. Solicitor firms who fail to get offerings right for consumers may see these retail buyers bypass them to seek refuge in familiar brands."

It also warned: "If a business is not reinventing itself to adapt to changing market conditions, then it is highly likely it will go into decline or be taken over by those that are better adapted to the new environment. This statement is no less true for law firms than for any business."

Another source of competition comes from clients themselves. Whether consumers or in-house legal teams, the trend is towards 'unbundling' legal work –

## 10 practical tips

### From LawNet Mark of Excellence - Lessons for law firms

1. Make someone responsible for first impressions and train all staff in making the right impression.
2. 'Mystery shop' your own business as if a customer – are the first steps of the customer journey inviting?
3. Map out the customer journey from start to finish.
4. How accessible is the business. Imagine wanting to make contact at all times of the day. How easy is it? What about when you are busy?
5. Impose firm-wide policies for response times to email and telephone enquiries and make people accountable.
6. Agree the format for communication, frequency of contact, and costs with clients at the start.
7. Refine the process of follow ups – decide how many attempts to contact people.
8. Ensure information about contact details is taken in a consistent way.
9. Agree follow-up at the point of enquiry to get customer buy-in.
10. Track results of follow-ups and record business obtained through follow up.



doing as much as possible of a legal matter yourself so as to reduce the time you pay a lawyer. Sensibly, more firms are accommodating this desire among clients to 'do-it-themselves' and pay less, assisting clients with the resources they need, and stepping in only when needed.

While it is true that 'Tesco Law' has not yet happened and conquered the legal market, there remains the distinct possibility it will happen. The Law Society report predicted that "2020 should see ABSs as a fully entrenched part of the profession and serious competition to smaller-medium B2C firms".

However, until that time, a window of opportunity remains open for law firms to move quickly into the retailers' territory, where concepts like the client journey, cross-selling, and customer loyalty have been at the top of the agenda for decades.

#### **Why customer service?**

In her introduction to the 2016 customer satisfaction

index produced by the Institute of Customer Service, its chief executive, Joanna Causon, noted that customer satisfaction was improving in most sectors, but she identified the collection of customer information as vital: "The key to delivering more personalised, relevant and meaningful experiences is greater insight about customers' behaviour, priorities, needs and preferences. Yet to glean these insights, organisations need to persuade customers to share personal, sometimes sensitive data."

Are lawyers doing this? While some firms are undoubtedly collecting and analysing customer data, the evidence from mystery shopping exercises suggests that many others are failing even to respond to initial enquiries promptly and effectively, let alone follow up clients after their matter is completed. If this approach is indicative, the signs are not good.

It suggests law firms have a long way to go before they equal the retail sector for responsiveness. Initial

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# Customer service: The ultimate business development tool for law firms

By Professor Ian Cooper



Professor Ian Cooper is Britain's most experienced specialist business development skills trainer for the legal profession.

When it comes to achieving outstanding business development success, who is the most important person in your firm? Your managing partner? Your head of business development?

No. The answer is your customer/client.

As I got up to speak recently at a seminar on customer service for law firms, I overheard someone mutter: "Here we go again, another lecture on being nice to clients, what a waste of space." That is a very expensive and dated attitude.

Firms that understand the power of four simple words – being nice to clients – and place the customer's needs and feelings at the centre of every decision and interaction, are the ones that will establish a differential advantage over their competitors, be able to charge the fees they deserve and have a commercially successful future. The rest will stagnate and get left behind.

Here's some food for thought, based on my own research and work:

- 68% of firms have no policy for keeping in touch with clients after a matter.
- 45% of firms still have limited information about their own clients.
- Approximately 70% of firms don't carry out regular client satisfaction studies.
- Fewer than 30% of firms have active systems for cross-selling and only 10% train staff in this.
- Fewer than 10% of firms factor

interpersonal skills into their staff recruitment criteria.

- Fewer than 10% of firms provide training for their partners and staff in customer services techniques, strategies and personal skills.
- On taking incoming new telephone enquiries, in almost a third of all calls neither party knows who they are speaking to.
- Only around 25% of firms have a structured system to foster recommendations and referrals.

With these startling statistics in mind, here are just a few of the key things you must understand or learn:

## Customer service is about every aspect of a firm's business

Customer service is much more than a separate series of 'things to do', dreamt up by a few of the partners who get it and then left to the marketing team or practice manager to run.

Customer service is a way of thinking. It is a mindset to be embedded in the focus and philosophy of the firm, one that drives every decision, communication and interaction.

## Customer service should be experienced as an emotion

The aim of great customer service is to positively influence the feelings of clients, and to feel good about the firm and its brand.

People make their decisions to choose you, return for more, or

recommend you, based totally on how they feel. If you want to encourage and foster these wise decisions, then your strategic focus needs to be on what you need to do, or say to influence their emotional state.

### **Great customer service wins you new business**

Customer service is not just about being nice; it can win you bucket loads of business.

The family department of one mid-sized firm I worked with increased its conversion rate of enquiries for private divorce work from a pitiful 13% to 82% in the space of a few months. Its problem? Callers, who were often emotionally distressed, were dealt with by untrained staff who treated potential clients as though they were a nuisance. They were processed. There was no real conversation, empathy, rapport or interest.

Once trained in customer service techniques, the firm was an extra £500,000 better off.

This is the norm, once people are given the techniques and service mindset.

### **Great customer service will bring you increased repeat business, facilitate cross selling and turn your past clients into your sales-force**

When do you next expect to be in touch with past clients after a

matter has been concluded? If you don't know, or care, I can tell you now that you are leaving cash on the table.

Keeping in touch to build a relationship, establish your ownership over them as a client and to make sure that they know of your full range of services, will keep them coming back. (Provided, of course, that they were satisfied with your service to begin with.)

I have seen keeping in touch and cross-selling help one firm achieve a 60% success rate on getting dormant wills clients back into the office to do more business, and another persuade 50% of residential conveyancing clients return to make a will and then 72% of them invest in a lasting power of attorney.

### **Clients will judge you by service delivery and not just your legal work**

You need to be able to differentiate between the technical quality of the legal work and service delivery. It's the same in most fields. Ask people to comment on things that are good and bad at their family doctor and they will talk about the receptionists, waiting times, the doctor's manner. Rarely will you get feedback about the clinical diagnostic skills of the physician, which are largely taken for granted.

Likewise, when did a client last tell you that your drafting skills were impressive? Clients will not judge you just by your legal ability, but by

how they were made to feel.

How were they greeted at reception? Did they feel you supported them with the right level of empathy and personal interest, and so on?

### **Customer service training is not optional**

Remember, people buy people.

Your people need to understand that good customer service includes certain personal skills. These include empathy, taking a real interest in clients, putting yourself in their shoes, going out of your way to help, and managing their anxieties and feelings and many other emotional triggers. All these and more, are personal skills and techniques that can be learnt and improved.

### **The cost of getting it wrong**

I have no doubt that in the current legal marketplace, those firms that don't buy in to a proper customer-focused service strategy, with appropriate staff training and recruitment thinking, will struggle and seriously underachieve.

The bar is set so low at the moment that there is a massive opportunity for those firms which embrace a real customer service philosophy to clean up.

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enquiries are the 'low-hanging fruit' of potential client acquisition and a business ignores these important first steps of a customer's journey at its peril.

A report by client feedback specialist Shopper Anonymous, *The client journey project*, which surveyed 85 law firms and recorded more than 400 one-to-one client experiences, makes disturbing reading. It found that discussions were followed up after just 7% of walk-in enquiries, 6% of website enquiries, and 7% of telephone enquiries. Incredibly, one in 20 firms did not even have an answerphone to receive out-of-hours calls, so the calls were lost.

Where web or telephone enquiries were left, in 35% and 45% of instances respectively the firm had not responded within two or three days. When firms did respond by email, 86% of the potential clients would have welcomed a live discussion but in reality this only occurred 25% of the time because contact details were not requested by the firms.

For law firms that have already mastered the basics of answering enquiries appropriately and are keen to immerse themselves in the detail of the customer journey, the network of nearly 70 law firms, LawNet, gives this advice: "The link between customer experience, loyalty and financial performance is well established. Leading organisations are long past debating the relative importance of customer experience management. Now they are focused on mastery, as the customer journey becomes ever more complex and the touch points more numerous..."

"What's clear is that client service should be a core part of a firm's business strategy and culture. As expectations continue to rise there is a risk of the gap widening between business performance and client expectations. So it's crucial to continually monitor, analyse, innovate and improve to safeguard on-going success."

### **Retail law**

Clearly not every law firm has made the transition in mind-set from the imperious professionals of the past to

*The link between customer experience, loyalty and financial performance is well established*

customer-friendly retail-style businesses of the present. Indeed, whether they should do so at all is a point of contention among solicitors. This is encapsulated in the sterile debate of whether they have clients or customers.

So attitudes to customer service cover a wide spectrum within the legal profession. There are firms which have completely reorganised themselves around non-lawyer marketing and other professionals, with the activities of the lawyers very much directed and channelled in the service of growing the business along commercial lines.

In an example of this commercial-focused approach, 17-partner Oxford law firm Brethertons recently brought in an academic researcher to audit its business. He broke down its output, on paper, into more than 300 'products' in order to see which were selling well and to discard the poor selling ones, in the hope of boosting profits. Net profits are reportedly on track to increase by 30% and turnover has increased from £10m to £12m.

Many other firms are bringing in marketing and business consultancy professionals to give them a commercial edge, and some are using the freedoms brought by ABS to reward those individuals with high-status positions. Some have swapped the traditional partnership model, in which lawyers have traditionally been responsible for strategic direction, and sometimes even day-to-day decision making, for one where a small management board, made up of both lawyers and non-lawyers, takes commercial decisions.

Firms that have done this often report lingering discontent among the partners, at least in the short term. Brethertons did this across several years, and now has a four-person executive committee. Its chief executive and director of legal services, solicitor Shaun Jardine, reveals that partners occasionally still attempted –

unsuccessfully – to influence decision-making, adding: “Getting there is not pain free. It took a number of years to get to that situation. But once you get there, it’s a good place to be.”

It is undoubtedly also true that some law firms have rejected a focus on customer satisfaction in favour of resolutely continuing to operate the same business models they have used for decades. They can afford to do so because they have strong local practices, are well established in their local business communities, and have a steady workflow from loyal repeat clients. This may be less of a conscious decision than tunnel vision under pressure of work, combined with the absence of need to explore alternatives.

It is probable that firms like this will carry on in the same way if conditions allow – and why should they invest heavily in modernisation when the business need for it is not pressing? But such firms are vulnerable to

future market shocks. Perhaps one day well-funded competition will arrive in their local area, undercutting on price and service and rapidly peeling off lucrative clients? If this happens, it may be too late to respond in time.

### The experts

Andy Cullwick, First4Lawyers’ head of marketing, says customer service is becoming more and more important because it is a differentiator between firms. “Most things are price orientated and when you start getting into bidding war, like the supermarkets, it becomes a race to the bottom on price over service.

“The people who want cheap and cheerful are always going to want cheap and cheerful, but these days they are demanding cost-effectiveness along with customer service too. So it’s vitally important that you get it right because it’s a key differentiator.” Indeed, research bears out that only a relatively small number of people choose legal services on price alone.

He points out that some retail brands which have established reputations for “stacking high and selling cheap” have disappeared from the marketplace. An example is the electronics retailer Comet, which failed to adapt to a changing market and thought ‘sell it cheap’ would work. Poor customer service, too much focus on selling warranties rather than products and a failure to innovate led to its downfall.

John Lewis is the perfect example of putting service over price. “People quite happily go to John Lewis, who will talk you through the benefits of one product and put service over price,” says Mr Cullwick.

Christina Blacklaws, the chief operating officer of 47-partner commercial law firm Cripps, which has four offices in London and Kent, agrees that firms should meet the “challenge” of delivering excellent customer service. Ms Blacklaws, the Law Society’s current deputy vice-president and former director of policy at Co-operative Legal Services, highlights the importance of making sure “that what we provide the client is something that will not only meet their self-defined



*Being a really good technical lawyer is taken as read, so what else are you going to be able to provide for your client? You need a deep and rich understanding of that client's journey*

needs but also completely delight them. We must challenge ourselves to exceed their expectations”.

Solicitors are sometimes derided for being poor businesspeople who fail to realise the importance of customer satisfaction. Yet this may be an unfair characterisation, especially when most lawyers are highly aware when the competition is circling their valued clients. “I think most lawyers have a highly attuned antenna to their clients’ needs,” says Ms Blacklaws.

She continues: “Being a really good technical lawyer is taken as read, so what else are you going to be able to provide for your client? You need a deep and rich understanding of that client’s journey. I think a lot of people who are good at this do it intuitively. But there’s no room for complacency – not in our competitive market.

“Even clients who have been loyal to firms for years may walk away these days. There isn’t any certainty you will be able to keep the client unless you’re providing

## Case study

Stephensons is an excellent example of a law firm that is willing to innovate to secure and retain clients. It is a 39-partner full-service firm with 10 offices across the country, including Manchester and London, and clearly demonstrated the importance it places on customer service by appointing its head of marketing, Sarah Boustouller, as a partner.

Ms Boustouller heads the team of six and the firm’s customer service programme. Her approach is ‘client-centric’ in order to compete with larger firms and to “find new ways to stand out from the crowd and make sure that we gain repeat business from our existing clients”.

She continues: “This is how we compete with larger players who have merged together and have a huge spend. We have to find a way to stand out and grow our share. As a firm we want to deliver the best service available and be known for it.”

The firm takes a broad, holistic view on what constitutes customer service. It runs a dedicated client loyalty and membership scheme called

Constant, providing a “variety of legal tips, guides, how-to videos, fixed price services and discounts”. The scheme was designed to provide added value and build lasting relationships with valued clients.

Ms Boustouller explains that the Constant programme was developed after substantial research with former clients. “We ran focus groups with our clients and asked ‘we are thinking of launching a loyalty scheme, is this something you would want?’ Our clients said that they would still like to hear from us even after their cases have concluded. That was obviously very encouraging.”

Clients said that they were not expecting discounts on products and services unrelated to legal services. “What we came up with, and continue to develop, are offers which complement our services. We do a lot of residential conveyancing, so – as one example – we offer 50% off storage of goods when you’re moving house.

“Also, for clients who have had a bereavement or are getting divorced, we offer a free counselling service.” The most popular feature of the scheme, Ms Boustouller reports, is the wide array of

them with a fabulous service.

“It helps to have a good understanding of project management and process mapping of client journeys within the firm. Then you can re-engineer your systems to create a best practice approach and train your colleagues to embed a new, more efficient and client-centred culture.”

The heavy caseloads of many lawyers mean they need support from non-lawyers who have the time and expertise to work on improving the client journey: “In any full-service law firm it is always going to be a challenge but I think there is support that can be put in place to help. At Cripps, lawyers and other professionals work collaboratively around clients. Involving business support people – whether from project management,

Sarah Boustouller



self-help guides and videos which are located on a dedicated microsite, the Constant Hub, as well as in a monthly communication to all existing and past clients.

According to Ms Boustouller, it is not enough for the firm to give a good ‘black letter’ legal service to clients, or to provide an after-care service to keep them on-side thereafter. In addition, using a ‘multiple strand’ strategy, Stepsons seeks to tempt new clients into buying legal services by raising awareness among people who were unaware they had a route to redress.

Campaigns need to be evaluated for the return they can deliver. Any content campaigns without a clear goal run the risk of spending valuable resources with no promise of a measurable return. When done well, however, campaigns help to raise the firm’s profile and cement the lawyers’ reputations as experts in their respective fields.

One of Stepsons’ recent campaigns concerned the prevalence of asbestos in school buildings and the danger this posed to children. “We looked at research to see how prevalent asbestos was in school buildings, before comparing that with populations of school children across the UK. We commissioned a

graphic designer... to create an infographic and ‘heat map’ showing the areas where the issue was most pronounced.

“Our aim was not to only draw attention to the enormous risks from mesothelioma and other asbestos related diseases, but to position the firm as a thought leader.”

Another campaign focused on cerebral palsy. This included online video case studies, showing the challenges of raising a child with the condition.

The firm also contacts former clients regularly. It spends time mining the data provided by its Tikit customer relationship management software – which is separate from, but integrated within the case management system – in order to discern what clients are interested in looking at.

“We’re not interested in sending our former clients anything and everything. That would be a poor use of our time and a waste of our former clients’ time. Instead we’re continually reviewing and revising our content based on individual likes and dislikes. If a former client enjoys reading content about debt management, or consumer rights, then that’s what we’ll send them.”

*In order to provide the very best in terms of client care we invest heavily in the training of our people, and devote a significant amount of time to bi-annual appraisals for all of our staff*

business development or analysis backgrounds – works for us and our clients.”

Lawyers can also be too busy to notice business opportunities, warns Mr Cullwick. “They can get so focused on the one thing that they’re dealing with, they forget for example that they are a multi-disciplinary firm and that their client may want conveyancing or another service in the future. A prime example is that if someone is coming to a lawyer with a personal injury and they are successful in the claim – well, actually, there is a wealth management issue on the back of that.”

Non-lawyers can be used to help create more “natural relationships with clients”, in which “cross-selling doesn’t seem like cross-selling... when you build a relationship with the client and you offer other services it seems like you are fitting around their needs rather than just trying to sell it them something.

“You might do well to bring somebody in to help run the business more effectively and think about how customers want to interact with you, because the reality is that if you don’t, somebody else out there will already be doing that.”

### **The innovators**

A willingness to adapt your service to meet client needs – and at the same time improve your business performance – is the essence of the sort of enlightened self-interest that has transformed the customer’s experience of virtually all commercial interactions in recent years. A good example of this is the employment by multi-disciplinary Huddersfield law firm Eaton Smith of a third-





party business to sign up prospective clients in their own homes. Upon an enquiry, the fee-earner who will deal with their case speaks directly to the client in the first instance. Then they are visited at home after giving their consent.

Partner Adele Whitfield explains that doing this enables the firm – a member of the First4Lawyers network – to take enquiries from all over the country with minimal loss of business: “We’ve found that if we do it on the phone, by the time they receive the paperwork they have forgotten what we said and just end up binning it.” The proof of the success of this strategy is that the number of clients retained after making an initial enquiry is 95%.

The smart firms, such as Stephensons (see page 14), have developed a ‘client-first’ mentality which means they monitor closely their customers, to the point where everyone is polled to determine their level of satisfaction after their case is concluded.

Samantha Hemsley, national head of the serious injury and clinical negligence team based at the London office of Thompsons Solicitors, the trade union law firm, explains how the firm invests in client care, including regular audits to check that its lawyers adhere to best practice. Internally produced best practice manuals guide each specialist team.

“In order to provide the very best in terms of client care, we invest heavily in the training of our people, and devote a significant amount of time to bi-annual appraisals for all of our staff.

“We believe in developing teams with expertise in each area of specialist litigation. We only use experts with a track record of excellence and we seek out counsel who possess a national reputation and proven experience in each area of specialism.

*A willingness to take on board the results of client feedback, and learn from that is crucial*

“At the conclusion of each case, we invite client feedback. We share the feedback we receive with staff, and with our trade union clients. In the rare event of negative feedback we investigate and revert to the client.”

### **Harnessing technology**

One thing that unites the experts is their belief in the vital significance that technology – the Internet in particular – has for developing a focus on the customer journey now and in the future. Not only does digital technology provide an unrivalled cost-effective means of ensuring continuing contact with clients, but future generations of clients are expected to access legal services exclusively online – and as a matter of course give honest feedback on their experience. Arguably, this change is already underway.

“The reality is the so-called ‘Millennial’ generation is coming through, and already all of us are more web orientated. When we want anything these days, generally the Internet is the first place we go,” says Mr Cullwick. Lawyers should not resist the emergence of comparison websites and online feedback sites, he adds.

“A willingness to take on board the results of client feedback, and learn from that is crucial,” says Ms Hemsley.

Stephensons’ Sarah Boustouller singles out online as the one thing above all which should not be ignored: “It cannot be underestimated in terms of reaching prospective clients in a cost-effective way. If a firm has no online presence, then you are missing a huge chunk of the market and there is no other way to get in front of it.” Recent research from Yell found that there is inaccurate information about most law firms on the Internet – yet another thing for firms to worry about and correct.

Eaton Smith’s Ms Whitfield stresses the importance of keeping the firm’s web presence up-to-date. Her firm is working on a relaunch of its site, which is about

five years old, she says. “The Internet is absolutely key; people are not just on laptops anymore, they are on their phones so it’s extremely important that, for instance, websites are mobile friendly and need to be updated regularly. You need to make sure you have fresh content on it.”

Ms Blacklaws says her firm is acutely interested in how the ‘Millennials’ operate, pointing out that by one definition some are already in their mid-30s, and “becoming key decision makers in their businesses”. She continues: “So it is absolutely vital that in a law firm where archetypally the business leaders may be in their 40s, 50s, or 60s, we don’t make that rookie error of assuming that our clients are like us or that they want the same things delivered in the same ways.

“That comes back to the absolute necessity of keeping clients at the heart of the business. One of the critical things is to ensure that we are always actively listening to clients. The more we can hear – and capture – from clients, the more successful we are going to be.”

# Charting the future

Customer behaviour will continue to evolve and so too will the demands placed upon service providers to respond. Key to future success will be identifying and responding early enough to new trends. Based on our experience and research for this report, we think all law firms need to think about the following developments now:

**A fully-automated online offer:** Many consumers now expect automation in their dealings with service providers. Lawyers have to get used to the fact that more and more customers want to purchase legal services in the same way they do other services and products.

Even if they value face-to-face contact at the start of the process (which many still do), they do not want to have to keep coming in or calling if they can avoid it. Further, they need to realise that many transactional parts of the lawyer-client relationship can be done better, quicker and more cost-effectively by taking the lawyer out of the relationship.

The robots won't completely take over, however; it's all about choice. If a client wants the human touch, then that's what you need to give them.

**Comparison websites will be the norm:** They are in many sectors and we noted earlier that the Competition and Markets Authority and Legal Services Consumer Panel are both very keen on such websites gaining ground in the legal market.

We find that many law firms view comparison and review websites as the start of a race to the bottom where they will only ever be judged on price.

Equally they feel that because they offer a much more subjective service as opposed to selling a tangible product, clients will simply mark them down on service for



the wrong reasons, the obvious example being that a case fails because of the law, not because of bad advice. We all want positive reviews but the reality is all reviews benefit a business depending on how you respond to them.

**Understand that you no longer manage the customer journey, your customers do:** In the age of the empowered customer, the interactions your customer makes with your business and the choices they make cannot be managed. A complete change of mind set is required, along with a great deal of flexibility.

**Big data will drive everything:** While you might not be able to manage the customer journey, you can understand it.

Big data – loosely defined as high volume, high velocity, complex data that usually requires highly specialised skills and technology to process – has been harnessed to great effect by retailers and its use is spreading across other sectors.

Over the past two years, we at First4Lawyers have embraced it too, which has delivered significant marketing improvements. We began with detailed research and persona building of our claimants to understand the differences and unique characteristics between the types of people that make a compensation claim. In turn, we reviewed our website presence, TV campaigns and digital marketing structure and fundamentally reviewed how and where we go to market.

The lesson here is that you can clearly articulate specialist areas of practice and profile the right people to show how you can help a client, but appearing in the right place, at the right time, and with the right product can be the big difference.

**Don't ignore collaboration:** Many big brands have made collaboration work – think Apple Pay and MasterCard. Law firms need to be alive to the possibilities that collaboration can bring. If you don't, you can be sure someone else will. Amazon Law anyone?

# Qualified leads direct to your business. Surely it's a no brainer?

**Would your firm benefit from receiving more qualified leads,  
saving you money and improving customer satisfaction?**

First4Lawyers are experts at generating qualified legal enquiries for all areas of law, including Personal Injury and Medical Negligence. As the UK's largest multi-award winning independent legal marketing collective, we can help you and your firm to maximise the impact of your marketing budget, making it more effective and efficient.

Our legally-qualified advisors apply rigorous vetting procedures to over 200,000 enquiries each year to ensure only the highest quality leads reach our panel members.

There's also no long-term contract and a three-month trial, so it really is a no brainer.

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