

## Client Relationship Reviews

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By Leon Sacks



The highly competitive nature of the legal sector provides an unprecedented number of choices to clients. Investing in existing client relationships can generate growth at less cost than developing new clients. Why then is there a reluctance on the part of many lawyers to invest time listening to their clients?

Common retorts include the following:

- External surveys and internal feedback show that our clients are truly satisfied with our services and our rate of retention of clients is high; and
- Partners obtain adequate client feedback through their relationships and frequent communication with clients.

However, surveys have limitations – often because they either require that questionnaires be completed (Who loves completing these?) or because questions are generic in nature. Furthermore, feedback to partners may have limitations because it is not necessarily aggregated at the practice or firm level to determine common issues. Often resulting actions, if any, depend on individual partners and are not institutionalized.

In my experience, even where client relationships are very strong, a face-to-face relationship review or client-feedback review can prove to be very effective. It can achieve the following (examples of client comments received during relationship reviews in italics):

- **Elevate the image of the firm with the client**

*“This initiative is excellent and it is the first time that I have been visited by a law firm to conduct such a process. Congratulations! Now it is important that this not be an isolated action and that there be continuity and appropriate follow-up.”*

- **Identify actions that should be taken to improve service**

*“You need to always be solution-oriented. On one occasion your X office presented the problems on a particular issue without stating solutions – this frustrated our commercial area.”*

- **Discover opportunities for expanding/improving the relationship**

*“We are going to hold a meeting of our internal counsel in each office to identify and discuss our top compliance issues across the region. Yes, we would welcome a presentation from your Compliance group on current legal trends and such issues at the meeting.”*

A relationship review consists of an interview with the client representative who has the most knowledge of the relationship. It provides the opportunity to explore issues to allow for appropriate follow-up and action.

The interview should be conducted by a person who does not have direct involvement with the client, both to demonstrate that this is an initiative of the firm as a whole but also to put the client at ease and not feel constrained. The interviewee could be another partner, a high-level executive officer or an external party.

Clients will usually be willing to participate in a relationship review if it is not overly burdensome (maximum one-hour duration, conducted at the client’s premises, and not repeated more than once a year), and if they value the relationship. Clients selected for a relationship review would typically include:

- recurring clients of significant size (e.g., threshold of fees);
- clients that are key targets and for which significant engagements have been conducted;
- key clients where performance or relationship issues have arisen; and
- clients where there are opportunities for diversifying service offerings.

The focus of reviews is to:

- gather information to better understand client expectations and satisfaction;
- uncover real strengths and weaknesses in client relationships;
- identify new business opportunities.

Reviews can also be finalized by obtaining quantitative ratings against different performance criteria (e.g. “understand your business”, “highly responsive”). This would enable comparison with other reviews, and also accompany progress at the same client in future reviews.

Internal counsel can easily adapt this review process to obtain valuable information from internal clients.

I strongly recommend that you consider listening to your clients in this way. While there will likely be both tangible benefits (e.g. new business) and intangible benefits (e.g. strengthening competitive position), at a minimum you will create a positive impression and the client will know that you are willing to invest in the relationship.

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