

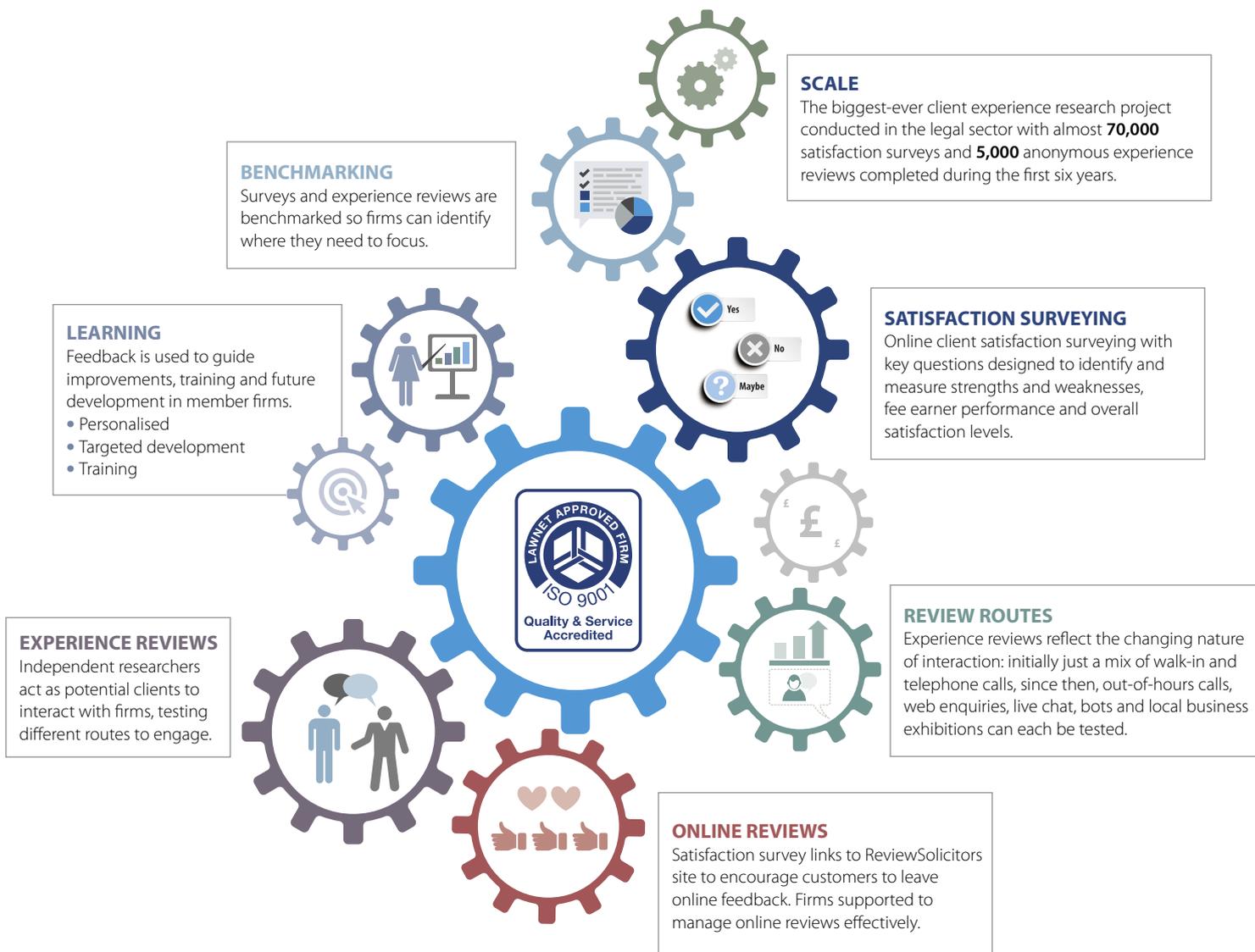
LawNet Mark of Excellence

Lessons for law firms



TARGETING EXCEPTIONAL EXPERIENCES

clients | employees | service



About the LawNet Excellence Mark ISO 9001 AUDITED CLIENT SERVICE CHARTER MARK

The research outlined here is undertaken by LawNet as part of the delivery and audit of the network's Excellence Mark. This charter mark is an integral part of the LawNet ISO 9001 standard, and means that client service is audited across all LawNet firms.

The independently-conducted research includes both client experience reviews and online satisfaction surveys, with feedback being used to guide improvements, training and future development in member firms. It is the biggest-ever client experience research project conducted in the legal sector, with 5,000 experience reviews and almost 70,000 client satisfaction surveys undertaken during the past six years.

Regular client experience (CX) reviews are a requirement for all members, with independent researchers acting as potential clients to interact with firms. Researchers use the telephone, unscheduled walk-in, web contact, live chat and out-of-hours routes to make their enquiries. Reviews are carried out across different departments throughout the year equating to a monthly check-in, but avoiding any regular pattern that firms could identify and respond to.

It is delivered through the professional services division of **insight6**, who provide one-to-one feedback and in-practice

training to support findings. Since the programme was launched in 2013, we have extended the range of reviews to match an ever-developing range of client interactions, so local business exhibitions, web contact, live chat and bots are all now being tested.

To capture client feedback, there are online satisfaction questionnaires, delivered independently through the **Law League** online portal, measuring strengths and weaknesses, fee earner performance and overall satisfaction levels. While performance is benchmarked against fellow LawNet members and other firms taking part nationally, firms are offered increasing personalisation to enable tracking of specific issues and initiatives.

With the rise of online reviews and peer-to-peer recommendations, we have also integrated our firms' benchmarking survey process with the **ReviewSolicitors** site to encourage customers to leave online reviews, and we have supported firms in developing the techniques to make the most of their positive feedback and manage any criticism effectively.

WELCOME

Welcome to our latest sector insight. This time, we look at how a strategy focused on measuring and exceeding client expectations can drive differentiation and performance for law firms.

Together with expert insights and strategic guidance, we assess the latest results from the sector's biggest-ever ongoing research undertaken in this field.

Understanding the client experience (CX) demands that you consider the sum of every interaction a client has with your firm; encompassing their total journey through your business. Following their experience of each touchpoint along the way, whether digitally or in person, opens the way to focused action to elevate performance.

Our continuing audit of client service in LawNet member firms is undertaken as part of our Excellence Mark and it provides a compelling picture of the impact of targeted action in this area.

We have analysed the outcomes to add data-driven insights and constructive tips to help you see how your firm can deliver improvement.

We developed our audited Excellence Mark because we saw client-focused service as the most important way our law firm members could add value and differentiate themselves, whilst retaining their independence, individual identity and brand. Six years on, the evidence speaks for itself.



WHY CX MATTERS

£122bn of BILLING

the amount lost to the UK economy each year through poor customer service

SOURCE: Institute of Customer Service

55% of CONSUMERS

are willing to pay more for a guaranteed good experience

SOURCE: ThinkJar

75% of CONSUMERS

expect a consistent experience wherever they engage – social networks, in-person, online or by phone

SOURCE: Salesforce

87% of CONSUMERS

think brands need to do more to provide a seamless experience

SOURCE: Zendesk

Setting the strategy

1 EMBRACE
Client-focused culture

3 MEASURE
Client-focused auditing



MANAGE
Client-focused systems **2**

DEVELOP
Client-focused learning **4**

Build a client-focused strategy on strong foundations

EMBRACE

Consistently, our research data has shown that a firm-wide commitment to improving client experience, and to learning from measurement and tracking programmes, will have a big impact on outcomes. Striving for excellence and continual improvement in this area needs to be embedded in the firm's culture, reflected in its values and objectives and demonstrated by the leadership. From there, it must be communicated clearly and consistently to fee earners, management and support staff so each person understands their individual impact and is encouraged to take ownership with true employee engagement.

MANAGE

Streamlining existing processes or developing new solutions to enhance and simplify the client experience is the foundation for a customer-centric approach, enabling staff to deliver on the cultural promise. It is not just about maintaining an accurate customer database, or making sure you comply with GDPR, although both are fundamental. It reaches into every aspect of how the firm functions, from ensuring that compliance does not become a barrier, through excellent communication, to exploring how technological infrastructure or customer-facing digital solutions may improve the journey.

MEASURE

Measurement is vital, as with any outcomes-focused activity. No single metric can tell the whole story; rather, you need to consider the building blocks that comprise a positive experience - such as satisfaction, engagement, loyalty and effort. Once measurement tools are in place to gather feedback and performance data, firms can focus on how to use the metrics to drive real performance improvements through process and people.

DEVELOP

A joined-up learning programme relies upon insight gained through measurement of the client experience being communicated back out to staff, with development needs recognised and acted upon. This is critical to ensure the business is always moving forward and exceeding clients' expectations. Culture fuels change, and organisations that prioritise continuous improvement, skills development and employee engagement in this way will be the ones to reap the rewards.



IT'S A PIPE DREAM TO CREATE HAPPY CUSTOMERS WITHOUT HAPPY AND FULFILLED EMPLOYEES
FRED REICHELLED, CREATOR OF THE NET PROMOTER SYSTEM

Culture-focused strategy

Turn employees into ambassadors and clients into devotees with a focused strategy that differentiates your professional expertise

Tomorrow's successful law firms have already recognised the inevitability of change and disruption in their marketplace, and are focused on differentiation through innovation, both human and digital. They have a robust strategy, respond swiftly and recognise that engaged employees and satisfied clients are key to success.

The legal sector is in the business of delivering professional services, but it's not just about quality of advice and professional expertise. It's also about the things that make people feel valued as a client, and paying attention to this can set firms apart from the rest.

There is a tension between how professionals have traditionally practiced and the need to put the client at the heart of every process and be responsive throughout the day, but firms who have resolved this challenge are demonstrating a real return on investment.

In 2015 we published the first detailed analysis of our research, which revealed firms were scoring highly for technical expertise

and delivering positive outcomes, but also some key areas for improvement. Speed of response, upfront clarity on timescales and fees, combined with regular progress reporting and fees updates, were the areas with the most potential to increase client satisfaction.

Having completed six years of the LawNet Excellence Mark programme, we have clear evidence that this process of measurement and support can drive significant performance improvements in our firms. At a headline level, overall satisfaction recorded in our first benchmarked surveying across all firms came in at 89% in 2012-13. This was an impressive result, but targeted action by our firms since then has helped them to achieve a 97% overall satisfaction level, significantly higher than the sector as a whole, where 84% of consumers are satisfied (LCSP Tracker Survey 2018).

Firms with successful client experience programmes recognise the importance of their employees in achieving this. They create a culture and environment which fosters employee engagement to deliver an excellent client experience.

LawNet firms share their experiences and solutions

DEVELOPING A CULTURAL SHIFT TO ACHIEVE EXCELLENCE

FROM THE FRONT

"Our overall strategy is supported by our firm-wide vision for 'shared growth through service delivery excellence' and our culture, core values, expertise and approach provide the foundation"

At **VWV**, the ethos of the firm promotes an appetite and passion among its people to deliver products and services to clients in a manner that is accessible, reliable and above all, excellent. Measured by client satisfaction milestones in the firm's business plans, client care is a key deliverable and is an appraised set of objectives and training requirement for every member of staff. A director of client relations sits on the board and ensures business strategy is always aligned with championing the client's perspective. Client feedback is used to drive future staff training and new processes.

Result: 82% of instructions in the last year came from existing clients, **99%** of clients say the firm provides high quality advice, **100%** of clients say they are happy to recommend the firm.



LawNet firms share their experiences and solutions

ON A MISSION TO MAKE IT EASY FOR BOTH STAFF AND CLIENTS

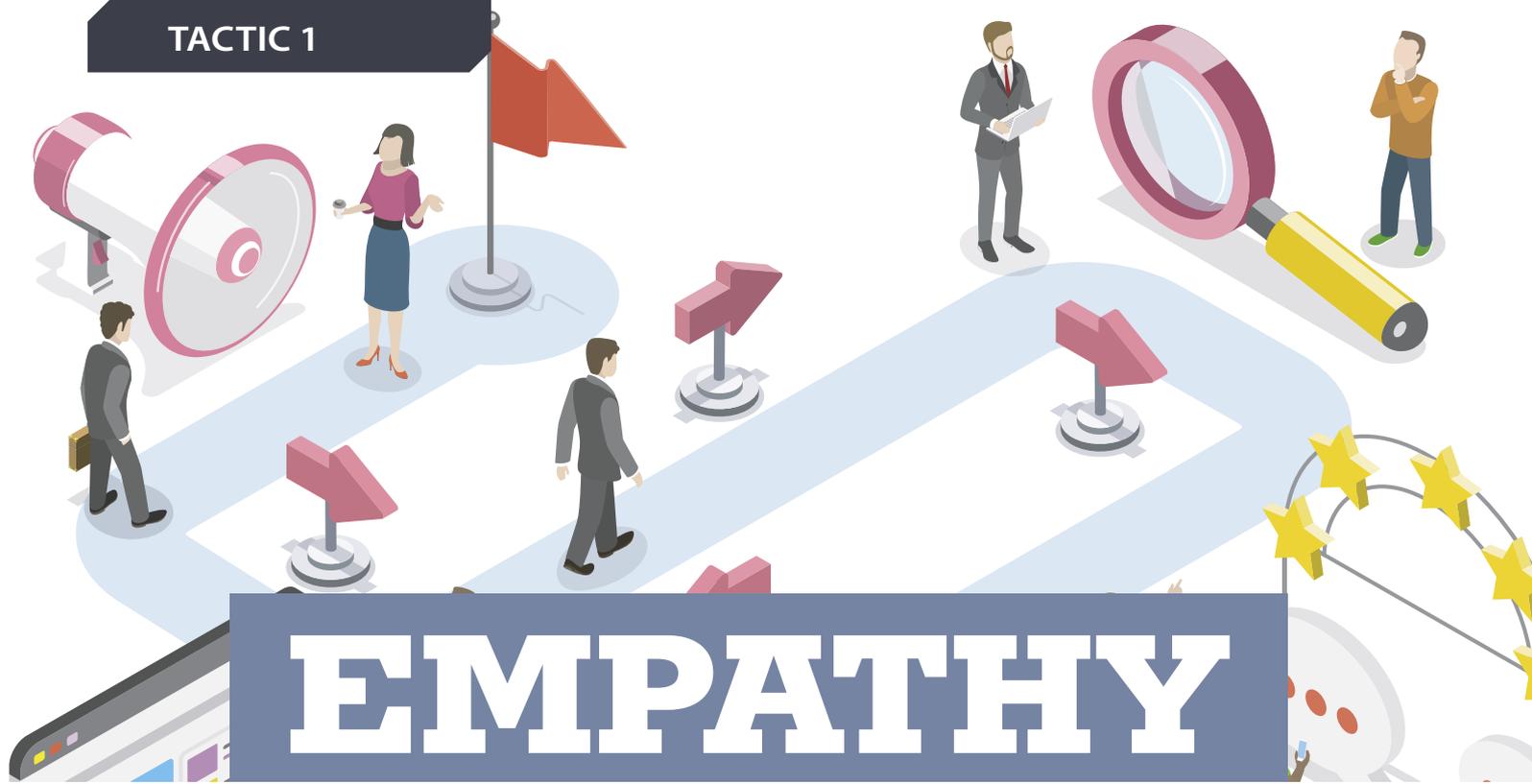
FROM THE FRONT

"Asking staff to 'make it easy' for clients gives a solid foundation for action and that's why 'making law easy for the client' is the mission at the heart of our values-based business strategy"

At **Rix and Kay** the focus is on simplifying things for both staff and clients. By establishing what the firm means by its mission of 'making law easy for you', and delivering tangible objectives for staff to act upon, their people are removing obstacles and reducing the amount of effort that clients have to put in when using their services. Staff are encouraged to put forward their ideas to improve, which has been hugely influential in shaping initiatives designed to make it easier for clients.

Result: 90% of staff say the strategy is helping them deliver a better client experience, **100%** of clients surveyed said they would use the firm again or recommend them to others, **97%** overall satisfaction rate.





EMPATHY

Be with your clients for the whole journey: stand in their shoes to understand their entire experience

Empathy requires us to be more human; demonstrating understanding and sensitivity to the perspective and emotions of others. Understanding what your clients are experiencing during their interactions with your firm and devising relevant solutions, can deliver a more valued experience and foster a deeper connection to set you apart.

Legal services are often needed at a challenging or emotional time, which makes it even more important to be on the side of the client, and to be sure that they can feel this in their interactions with you.

For many firms, the first step towards understanding client experience is to use a post-matter satisfaction questionnaire to measure performance. While that is important, a richer understanding can be achieved by appreciating the complete journey for your client. This opens the way to holistic client-centric service delivery.

end to end experience

Often the focus of client experience is on specific touchpoints and interactions with your firm. This is important and helps to clarify processes and accountability. But focusing on whether a client is happy at any given moment should not distract from the complete experience and thinking about how that may be meaningfully improved.

Shifting the perspective to a wider, more strategic level in this way will highlight the gaps in your processes or uncover where things break down. Client journey mapping is one way of achieving this.

Different clients have different journeys, so they need to be identified by demographics, such as age or geography for individuals, or industry sector or size for businesses. The journey will be different

depending upon which services they're using or how they engage – whether online, telephone, or face to face. Our member firms report that creating identifiable personas for different client types can be useful.

involve staff

It's important to involve staff in the process, both client-facing fee earners and support staff, who have valuable experience of how things work in practice and know where issues arise. It's vital also to involve specialist staff in areas such as IT and HR, whose processes will impact the client experience.

Focusing on your client requires you to stand in their shoes and have empathy with their experience. Try to understand the thoughts, feelings, and emotions your customers may have throughout their personal journeys. Consider the flows and accessibility - can you make it easier for them to find your offices or get through to the fee earner, or can you use plainer English? Eliminating stress factors can have a major effect on the overall experience.

be human

Consider using techniques like Design Thinking, a human-centred design process that uses observation, insights and experimentation to drive innovation and create client-focused solutions. For example, if research shows that many of those going through divorce find meetings stressful, this is likely to have a negative impact on the overall experience for these clients.

Modifying the way client meetings are held for these clients may be the answer, creating a different environment to reduce the formality and put them at ease. Empathy with the client is at the heart of good solutions.

LawNet firms share their experiences and solutions

FROM THE FRONT

PUTTING THE FOCUS ON SOLVING ISSUES FOR THE CLIENT

"We identified a need among those involved in e-commerce distribution for a way to monitor product safety to deal with new compliance requirements, so we developed an app that is solving problems for clients and beyond."

Gotelee Solicitors has created an entirely first-to-market, innovative app to assist e-commerce distributors in dealing with the knock-on effects of new HMRC legislation. Use of the app generates a clear, documented audit trail to demonstrate that a product safety due diligence check has been completed on a specified date and at a specified time.

Result: Innovation in Technology Award from the warehousing industry which has raised awareness in a key target market, overall satisfaction ratings show **95.6%** of clients would return for future needs and **94.7%** would recommend the firm.



LawNet firms share their experiences and solutions

FROM THE FRONT

MAPPING A PROGRAMME TO DELIVER PREMIUM SERVICE AT EVERY TOUCH POINT

"We have made premium service integral to our business strategy with a client journey programme which starts at the first contact"

Clarkson Wright & Jakes has mapped out a programme to meet client needs at each stage of the journey. And as that journey becomes ever more complex and touchpoints more numerous, new client care initiatives are regularly identified and planned, such as a designated client relationship partner or sharing forthcoming client meetings so others can say hello.

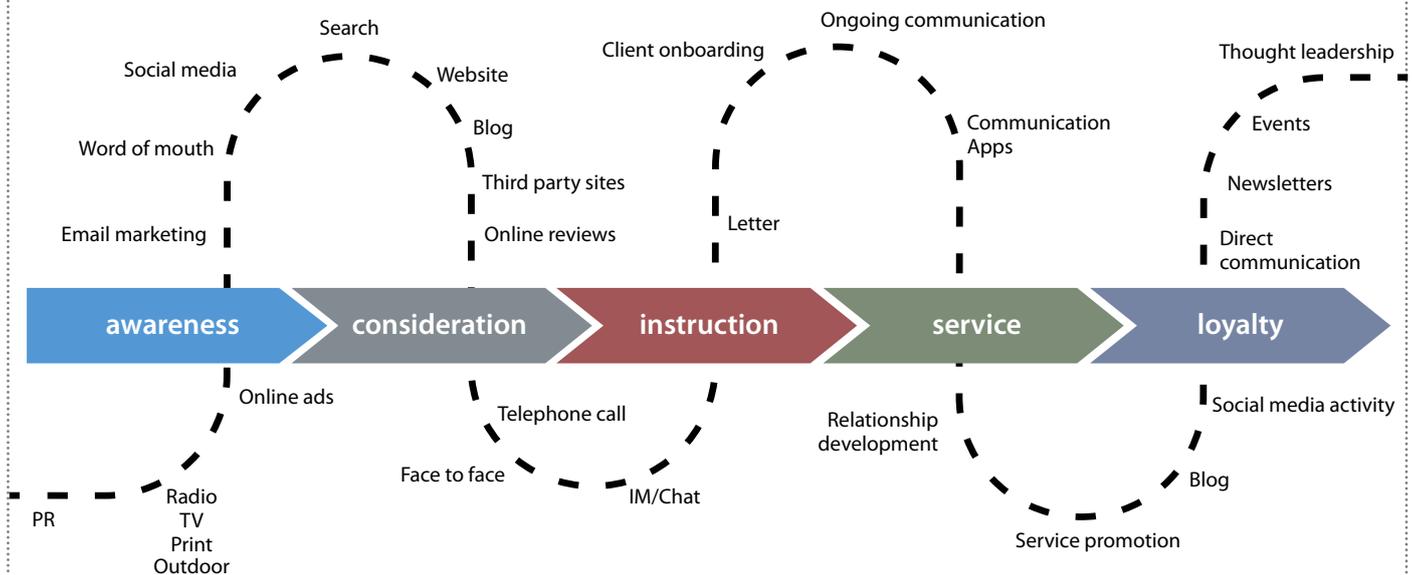
Result: 50% of new matters generated from the 3 Rs: repeat business, referrals and recommendations, 70% client service audit score, 97% overall client satisfaction rating.



Creating a client journey map identifies every point of contact between your firm and your clients

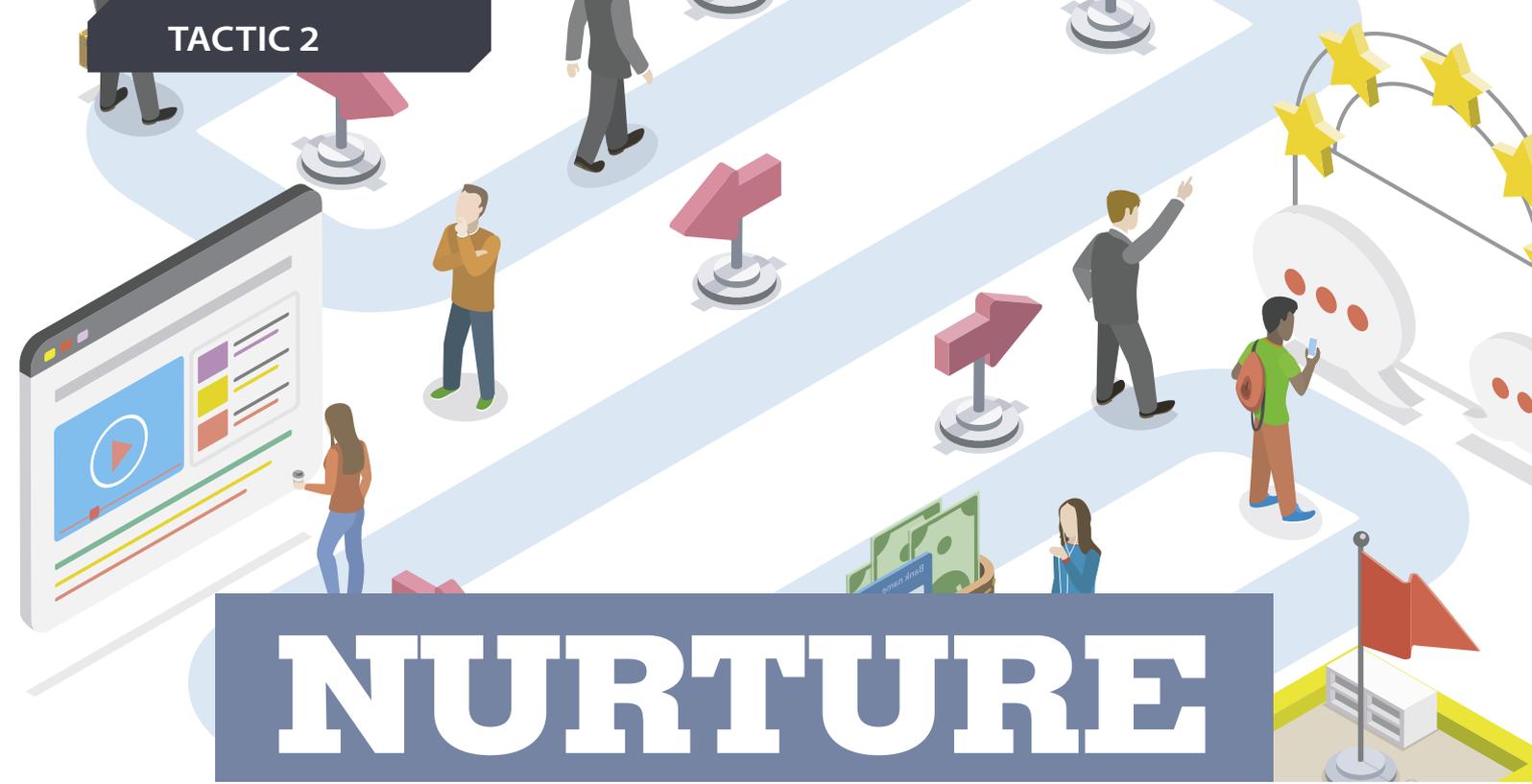
This is just one example of a firm-wide overarching communications journey. Also, great insight can be achieved by mapping specific types of services.

As clients interact with a firm, they will have different experiences at different touchpoints along the journey. Touchpoints could be internally-managed points such as your website, chatbots, emails, phone calls, events, client meetings and correspondence or externally-hosted online reviews, social media, advertisements.



TOP TIPS

1. Map out all the touchpoints of interaction with clients, from the first to the last
2. Understand how clients navigate across touchpoints through the journey
3. Identify the messages and experiences they receive at each touchpoint
4. Think about needs, expectations, and desires and compare with actual experience at each stage
5. Identify what is working and what is not
6. Work out solutions to address gaps and opportunities that can improve the journey.



NURTURE

Create conversations: ensure there are routes for open and meaningful dialogue with clients throughout their journey

Trust and increased personalisation have been identified by The Institute of Customer Experience as defining characteristics of a great experience for tomorrow's consumer. This means client experience must be constantly monitored and nurtured if we are to maintain satisfaction and keep pace with changing expectations.

Each year, the Legal Services Consumer Panel asks consumers how they are choosing and using legal services. In their 2018 findings, 35% of the legal service users who expressed dissatisfaction did nothing about it.

There will be many different reasons why these users did not complain, but what really counts is recognising that not everyone who is unhappy will tell you so directly. It is vital that you focus on being client-responsive and look for feedback throughout the journey, not just at the end, as this gives you the opportunity to learn for the future as well as resolving problems that could cause reputational damage before they escalate.

the new word of mouth

This is increasingly important with the rise of online reviews and social media comments. Where word of mouth was previously limited to those people known to a client, new online channels have limitless audience reach. It is vital to engage with new opportunities like this, if you are not to be left behind. The value of this approach is demonstrated by LawNet members dominating the highest scoring solicitors' firms in the UK, as ranked on the ReviewSolicitors website by clients.

This emphasis on reputation is reflected in our research and elsewhere, including that undertaken by the Legal Services Consumer Panel. Consistently, our feedback shows the price quoted for a job is one of the **least important** factors in the decision to appoint a firm,

with recommendation or previous contact being the most persuasive factors.

Where our research has also aligned closely with LSCP is in the learning points – which highlighted the importance of regular communication, timeliness and keeping clients up to date on costs.

embracing digital solutions

There is an opportunity to use digital transformation to address customer demands and we have seen our member firms introduce a range of technology solutions to improve communication at each stage. In one, a multi-channel approach sees a variety of apps keeping clients up to speed with case progress, along with an online Live Chat function. Other firms are evaluating the potential of new technological developments through the use of robotic process automation (RPA), bots and other AI innovations that can improve client experience and service delivery.

personalisation, speed and ease

While technology can deliver some improvements, it's also important to ensure that resources and policies are in place to ensure fee earners and support staff respond to client contact and queries in the right way and within a set timeframe. Simple changes have been shown to bring remarkable results, such as staggering lunch breaks within departments or using external telephone services so someone always answers; or receptionists introducing calls to fee earners so they can use the client's name immediately.

What's clear is that expectations are evolving fast and bringing an even greater emphasis on personalisation and the speed and ease of service, raising the risk of a widening gap between business performance and client expectations. So, it's crucial to continually monitor, analyse, innovate and improve.

LawNet firms share their experiences and solutions

INVESTING IN STAFF TO DRIVE RETENTION AND REFERRALS

FROM THE FRONT

"Building the points of interaction with clients is helping us to identify issues before they become a problem"

In an increasingly competitive market, **Lamb Brooks** recognise that happy clients who return, recommend and refer are their most significant asset and the firm makes a promise to be with clients every step of the way. Investment in training and development ensures staff are engaged and equipped, recognising that people are key to delivery of excellent client care. Regular contact with clients gives a platform for issues to be raised, so they can be tackled immediately.

Result: Over **70%** of new business comes from recommendations and existing clients. Overall customer satisfaction is at **99%**.



LawNet firms share their experiences and solutions

DRIVING REPUTATION THROUGH TACTICAL SOCIAL MEDIA

FROM THE FRONT

"We see social media as a crucial tool in building awareness of our reputation for quality service to help us attract new clients"

Biscoes has identified social media as a key component of business development. The firm publishes and shares testimonials from satisfied clients and high-profile cases to raise awareness. Testimonials are published on their website and shared through Facebook and Twitter as appropriate, as well as on ReviewSolicitors. Staff are encouraged to use social media in a positive way with each department having its own Twitter feed to share and promote the firm, the services provided, the team and individual expertise.

Result: Turnover increased by **32%** in the last financial year, **80%** of new business sourced from client referrals.



84% say they value recommendations from people they know above all else

SOURCE: Nielsen



People are 4 times more likely to buy when referred by a friend

SOURCE: Nielsen



92% say they read online reviews as part of their buying journey

SOURCE: BrightLocal

AN EXPERT PERSPECTIVE

– insights from the specialists in client experience

HOW TRANSPARENCY BUILDS TRUST

Online reviews are a powerful marketing tool for attracting clients to your firm. A look at how to harness the power of user-generated content with Michael Hanney of ReviewSolicitors

More... short read:

lawnet.co.uk/news-blog/the-lawnet-blog/guest-blogs/

TOP TIPS

Feedback from clients shows the top areas for firms to target:

1

PROGRESS

Being kept up to date on progress, even if there's nothing new to report



2

TIMELINESS

Sticking to timescales or explaining why things are changing



3

COSTS

Regular updates on costs and explain additional charges in advance





Build the skills to grow relationships and drive improvements

Having a great service proposition for clients once they are on board is all very well, but the experience starts at enquiry stage, and demands the right processes for information capture and follow up.

Once in place, it's important that these processes are followed. Qualitative feedback from client experience reviews has shown that failing to follow up may be interpreted by the potential client as a lack of interest and firms are then unlikely to convert the business.

follow-up processes

Since identifying this as an issue, we have seen a number of different solutions implemented by members. At one firm, sales training has been introduced for fee earners; at another, all follow up is done by the business development team. Another has a sales director sitting on the board, reflecting an increasing prominence for sales and pipeline development in management decision making.

A key area highlighted during our research was whether and how costs are discussed with a client at the outset, as one measure we track through our client experience review is "did the team member confidently overcome the matter of cost?" The purpose is to identify any gaps in sales and negotiation skills at a crucial stage in the sales process, to see whether the lawyers concerned were able to sell the value proposition for their firm and were comfortable in addressing a challenge on pricing without resorting to discounting.

negotiating skills

Many lawyers see negotiating as part of their core skill set and a fundamental part of their day-to-day

business – mediating and negotiating between their client and the opposing side, whether a former spouse, employee or supplier. However, when it comes to negotiating with a client on costs, our research has shown there's often a skills gap. But firms show significant improvements once they know they need to develop these skills. Through targeted action, member firms increased their overall sales performance score to 53% in 2019, which is 19% higher than the national benchmark.

responsive training

Drilling down into the 150+ individual criteria being measured; many areas have shown exceptional improvements after being highlighted as important through the audits and subsequent training. Thanks to nuanced attention, the way that walk-in enquiries are handled has improved by 24% in the past four years, and the way that staff handle the potential sales lead, by asking for permission to follow up on the enquiry, has recorded a massive 41% improvement.

We see process improvement and real performance gains across the board, as a direct result of the response made by firms to the client experience reviews.

Overall, client experience reviews now average 67%, with some firms achieving over 80%. This average is currently 9% ahead of non-LawNet firms. While our members are not the only ones to see the importance of great client service and subtle sales skills to convert more enquiries, they demonstrate that continuous improvement is vital to maintain any advantage. Better scores are often linked with conversion-related activities which are essential in our ever-changing marketplace and increasing competition.

LawNet firms share their experiences and solutions

FOCUSED CLIENT RELATIONS TEAM FREES UP LAWYER TIME

FROM THE FRONT

"The client relations team is continually evolving to ensure they deliver the utmost benefit to our clients, closing any gaps in service identified for improvement."

At **Band Hatton Button**, a focused growth strategy has seen the establishment of a client relations team to take the lead in handling new enquiries, undertaking follow up and anywhere that lawyers don't need to be involved, freeing up fee-earning time. That includes opening all new files and in part of the closing process, ensuring greater consistency across the firm in both process and client relations. The firm is also embracing digital solutions where possible, including a portal for conveyancing quotes.

Result: Immediate improvement in customer service audit results. Clients report the conveyancing portal is 'slick, professional and efficient'. **98%** overall customer satisfaction score.



LawNet firms share their experiences and solutions

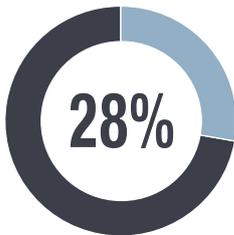
REACHING FOR THE STARS THROUGH STELLAR SERVICE

FROM THE FRONT

*"Our Stellar Service KPIs are embedded in our Client Charter and help everyone understand what they need to do to ensure the client journey with **FBC Manby Bowdler** is second to none."*

A dedicated new enquiries team, first trialled in personal injury, has been extended to the conveyancing department and other areas of private client work, making a marked difference to how clients are handled through the on-boarding process. Clear targets and action plans are in place, with success measured through client experience reviews.

Result: Net Promoter score **82**, up from **74** in two years, ranked 1st position locally on ReviewSolicitors and 6th nationally.

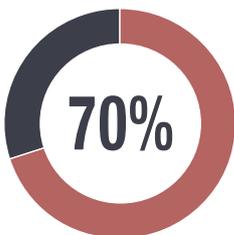


Law Society research shows buyers cannot differentiate between firms, but only **28%** of firms in national benchmarked surveying explain why a client should choose them

SOURCES: Law Society and insight6



vs



SRA research shows **95%** percent of lawyers think they explain the charging system clearly at the outset, but only **70%** of clients agree

SOURCES: 1. SRA. 2. LawNet Research 2019

AN EXPERT PERSPECTIVE

– insights from the specialists in client experience

WHY SHOULD I CHOOSE YOU?

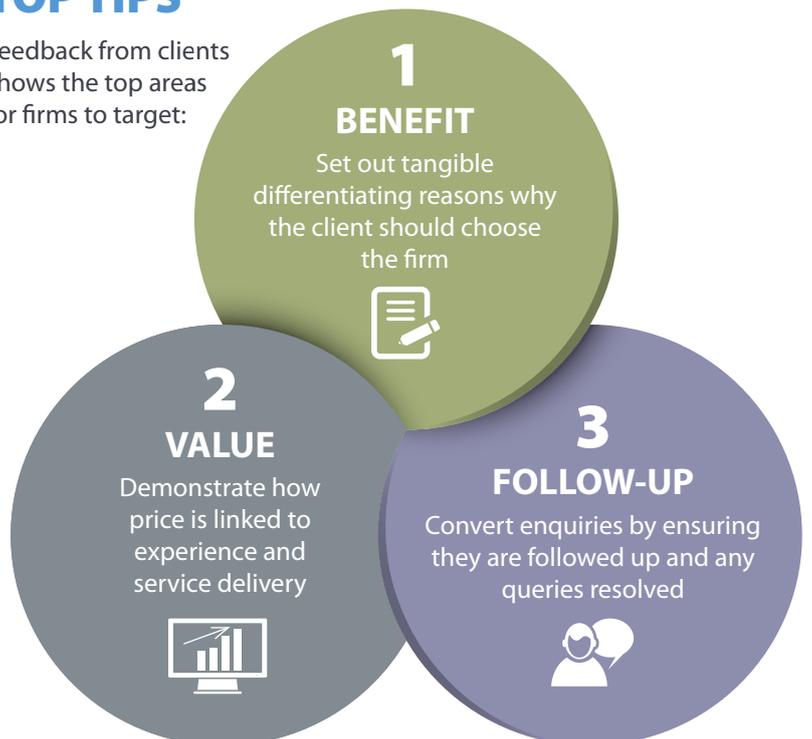
Supporting your fee earners to have positive conversations about the benefits of using your firm over your competitors and being able to link price to value, experience and service could be real differentiators, says Jim Smith of insight6.

More... short read:

lawnet.co.uk/news-blog/the-lawnet-blog/guest-blogs/

TOP TIPS

Feedback from clients shows the top areas for firms to target:



Membership benefits

- Stability and strength with the legal market's biggest group PII scheme
 - Cut costs through exclusive discounted services geared for firms like you
 - Raise your standing with internationally recognised accreditation
 - Improve performance through benchmarking
 - Invest in your people through bespoke specialist training
- Access leading edge thought leadership, strategy, marketing and management support
 - Share knowledge and learn in a non-competing environment
 - Have your voice heard in shaping future network strategy and services
 - Stand out in the market and deliver measurable, high quality client service through the LawNet Mark of Excellence accreditation and support package.



Formed in 1989, LawNet is the network for leading independent law firms in the UK and Ireland. It is also a member of Eurojuris, which links lawyers in 50 different countries internationally, providing opportunities to build relationships for offshore work and cross border referrals.

lawnet.co.uk

Further, together

