Thinking Small: Best Client-Services Practices for Small and Mid-Size Firms

By Amy I. Stickel

For many small and mid-size law firms that can't brag about worldwide scope and dozens of different practice groups, the emphasis instead is on developing close relationships and giving great client service. But saying you can offer those things to clients, and then proving it, are as challenging at small firms as at large ones.

This month, *Strategies* spoke to several firms in different areas around the country that have unique ways to reach out to clients.

Martinis & Manicures

Two years ago, Hermes Sargent Bates LLP was looking for client events that were a little different from the standard sports-oriented outings. Amy Davis Benavides, then an associate (and now a partner) at the 45-attorney firm in Dallas had heard about an event at a local bar that offered drinks, bar food and manicures.

It sounded like such a good idea that the firm decided to try it; and it has been such a success that the firm had to limit the last outing to partners, according to Lauren Laughead, Hermes Sargent marketing manager. Because of the venue and the nature of the event, the total list of attendees is limited to around 40, and there are usually more clients and prospective clients than Hermes Sargent lawyers. And it's not just women attorneys and clients who attend; there were about 10 men at the last event. "I was surprised by their enthusiasm," says Laughead.

The happy-hour events are scheduled on Thursday evenings at a trendy bar in downtown Dallas with valet service, flat-panel televisions and an outdoor lounge with couches. The bar coordinates with the manicurists, who offer complimentary services throughout the evening. Food is also available, and martinis are the featured drink at the open bar. Since the bar oversees all aspects of the event, including hiring the manicurists, it makes planning much easier, according to Laughead, who says Hermes Sargent still offers more standard client outings, such as sporting events.

Clients and prospective clients rave about the chance to relax, chat with attorneys and other contacts and enjoy a drink, all while getting their nails done, says Laughead. For many clients, they would otherwise have trouble fitting such networking (and pampering) into their busy schedules.

"The clients are always asking about when we will have the next one," says Laughead, who would like to plan the "Martinis & Manicures" event several times a year. At the same time, she says, "We don't want anyone to get bored with it."

Putting Clients First

At McNees Wallace & Nurick LLC, based in Harrisburg, Pa., the motto has been putting clients first. But when Jennifer Smuts, director of marketing at the 100-plus attorney firm, joined four years ago, the firm was doing very little in terms of following up with clients. "We were doing paper surveys," says Smuts. When she raised the possibility of launching a "Clients First" interview initiative, the initial reaction was, "Why bother the clients?" she recalls.

Nonetheless, Smuts convinced the firm's doubters that it would be worth a try to reach out to clients in a more personal way than paper surveys. So she and the managing attorney, Steve J. Weingarten, began visiting clients to ask them several basic questions: What are we doing well? What are doing badly? Would you refer us? And what do you think of the firm's brand and logo? (The last question was usually Smuts.)

Four years later, the process has evolved and has been, in many cases, remarkably useful for the firm and the clients alike. "It shows the clients we're taking the time to learn more about their business, and we're coming back with a lot more work," says Smuts. The firm may not have known about the additional engagement possibilities without the interviews, and the client may not have known that the firm had the expertise to handle that business. "The clients view it as very unique that the managing partner goes out, and we intentionally don't bring along the relationship partner."

There is no rhyme or reason to which clients Smuts and Weingarten visit during the course of a year, she says. They try to visit about a client a month, and it generally involves mid-size clients that the firm isn't as familiar with. Weingarten asks most of the questions, and Smuts considers her role as one of thanking clients for their business—and then following up with a list of action items drawn from the conversation and ensuring those items are being taken care of.

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One client, a food cooperative, was so pleased the firm was interested in its business that it invited everyone, including secretaries and paralegals, back for a tour and gave them all baskets of food.

But clients aren't always that happy in interviews. Some have taken the opportunity to yell and some have asked for new lawyers, says Smuts. And some have even resented having a woman in the room, she says.

Nonetheless, the process has been well worth it, and Smuts encourages other firms who are thinking about such an initiative to jump right in. "Don't be intimidated by the process," she says. "Just start doing it, because it will evolve over time. But keep it simple, and keep it light."

Where Everybody Knows Your Name

In law firm marketing and business development, it's so often a question of who knows whom. Miller & Chevalier, a 120-lawyer firm, decided to maximize its CRM system, InterAction, to help better answer that question, do we know anyone at this particular company? says Rachael Loper, manager of practice development at the Washington, D.C., based firm.

In order to do that, the firm synchronized all Outlook contacts into the database at once. "No hemming, hoarding or opting-out!" says Loper, who admits that there were any number of podiatrists and babysitters whose contact information had to be removed. "Due to our intense and ongoing clean-up efforts and firm-wide participation, we are encouraged and excited by the growing amount of accurate and useful information available," says Loper. "At any given moment, we can accurately answer the question, 'who knows who?' 'Do we know anyone at Acme Widgets, Inc.?' 'Well, yes, we've done some trade matters for them, and our new lawyer from the IRS knows their chief lobbyist.'"

At many law firms, CRM databases may basically serve as a means to generate mailing lists. But Miller & Chevalier has made it part of many users' daily routines. To stress the importance of using the system to attorneys and staff, the marketing department began an ongoing training and outreach program and an outside consultant, Deborah Holt, visits the firm every quarter. The internal business development newsletter is based on the program, practice group leaders run reports on upcoming events and which individual lawyers are participating in activities and the marketing department tracks events as well. Miller & Chevalier has two full-time dedicated staff for custom reporting and data monitoring and an IT staff member for back-end support, according to Loper. "The software is complex, and training for all user groups is not a one-time event but a continuing education process," says Kelly Stuart Stokes, marketing director.

The InterAction database has also helped Loper with what she calls "law firm marketing's most dreaded task: the in-house newsletter." In her first month on the job, she was assigned the task and pictured going over design drafts, chasing down attorneys for interviews and making countless rounds of drafts. But inspiration struck instead, and she realized she could recreate activities already found in the CRM database. Mimicking the style of "BNA's Daily Report for Executives," a must-read among the firm's attorneys, she developed an internal newsletter with just headlines and links for those with authorized access. Not only does it save a tree, Loper points out, but it offers the security of knowing sensitive information could not be forwarded to those who don't have permission to see it.

Miller & Chevalier has been able to glean other benefits from the CRM system as well, from helping lawyers easily track their visibility and business development activities to improving the referral process. "Yes, it's a lot of work and yes, it takes buy-in at the highest level. But in a business built on relationships, we cannot afford to be ignorant of who we know," says Loper. ■