

# Service Delivery Takes Center Stage

In my first college marketing class, I was introduced to E. Jerome McCarthy's "Four P's" of marketing: product, price, place and promotion. I have often used them to explain the breadth of marketing as it applies to the legal profession. Three of these components are easy:

- **Product:** Things like hiring the right people, the range of services you offer, your tangible output (e.g., documents) and process management.
- **Price:** How you charge for your services, such as hourly rates, flat fees, retainers and contingency fees.
- **Promotion:** Advertising, social media, public relations, seminars, webinars and alerts, for example.

The other P, "place," has always been the trickiest because it represents distribution channels. For actual products, this is easy to follow: A piece of furniture comes off the manufacturing line, goes to a warehouse, gets delivered to a store and ultimately arrives at your home. But how does the distribution function relate to legal services? It can include anything from the geographic scope of your practice and the firm's office locations to the technology you use to communicate or transmit documents — in other words, anything involved in delivering your services to clients.

For years, "place" was the largely forgotten "P" in law firm marketing. But no more.

## Delivering Your Legal Services

On a tactical level, service delivery may be the best way to affect the client experience. It involves interacting, exchanging information and communicating with clients. The following actions will improve your service delivery and quite possibly the way clients feel about you.

### Getting Started with a Client

You know what they say ... you never get a second chance to make a first impression. Here are some ways to make sure clients come away with a positive experience after their initial contact with you.

- **Make yourself easy to work with.** Send a map to your office and explain where to park. Provide information on members of the team who will be working with the client, and offer your assistant's name and contact information. Provide your cellphone number.
- **Prepare for the first meeting.** Confirm the details in advance. Prepare an agenda for the meeting. Create a list of assumptions to review with the client based on your experience or their communications with you.
- **Make your services understandable.** Use charts, diagrams, process maps or other tools to explain what the client will go through, whether it's a divorce, a trademark application, a deposition or an acquisition.
- **Review the client's preferences.** What technology is used? How detailed should the invoices be? How often is a status report desired?

What are good times of the day to meet or talk? How involved should the client's assistant be? Does the client like Excel or Word, a call or an email? Identifying preferences in advance will help you avoid service delivery missteps along the way.

## Meeting with Clients

The impression you make when you are face-to-face with clients will have a huge impact on their perceptions of your service and value.

- **Be aware of your behavior.** Exhibit good listening skills. Take notes; make good eye contact; nod and acknowledge what the client said; demonstrate open body language.
- **Go on-site.** Meet at the client's premises, not at your office. While you're there, take a tour, ask questions and meet additional people. See how the office operates, and take in the culture of the client.
- **Hand-deliver documents.** If there is a particularly good piece of news or complicated document, take the time to bring it by yourself for a signature, explanation or delivery.
- **Let the client witness your skills firsthand.** Invite a client to watch an argument or a video of your opening statement, for example.

## Communicating with Clients

It's hard to overcommunicate with clients. Frequent client complaints often involve a lack of contact. Try these tactics.

- **Have continual status reporting and communications.** There should be no surprises. If a meeting to discuss an acquisition may need to be rescheduled, let the client know in advance. Be sure clients see copies of materials (e.g., a deposition summary) before they get billed for them. Set up regular check-in calls or meetings with your most important clients to discuss work in progress or the pipeline of projects.
- **Customize your communication forms and formats.** If it's a contractor, present your updates in a Gantt chart. If it's a real estate developer, separate your legal fees by the project. For all clients, employ the preferred invoice format, frequency and level of detail.
- **Use their preferred technology.** Some clients will ask you to submit your invoices electronically; some will benefit from a shared site or extranet; some will tell you they are "texters" not "emailers." Listen and comply.
- **Be responsive and accessible.** Give good clients your cell phone number. Be available when they need you. And work with your assistant to better manage the client experience.
- **Speak in their language.** Present information in plain English. Make your recommendations understandable. Use clients' acronyms, terminology and shorthand. (In order to do this, you will need to know their business and industry.)

Over the years, I have seen the emphasis in marketing strategy shift between the four marketing components, and much of the conversation now is on pricing. However, I believe if clients are complaining about

“price,” it’s often because they are disappointed by “place” — the service delivery.

Are you delivering your services in a way that will make clients delighted by the experience?

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