GETTING THE CLIENT RELATIONSHIP REVIEW MEETING RIGHT

We are often asked by clients how they can conduct effective client relationship review meetings. Getting this right is very important – the feedback you obtain from your clients is essential to:

- improve service delivery
- develop future proposals
- reveal risks for you to address
- uncover business development opportunities
- increase satisfaction of professionals serving the client.

Reviews with clients can be great relationship builders, especially if they are carefully planned and executed to elicit frank and forthright feedback.

Expert, independent facilitation can be invaluable, so as a minimum, involve a senior professional who is not closely involved in the client work, perhaps your Managing Partner or a member of your marketing and business development team. Remember:

- greater “social distance” between participants (that is, people less familiar with one another and who relate infrequently, if at all) increases frankness in these settings
- less “social distance” between participants (that is, people who work together and know each other well) increases the level of detail in responses.

First, the basics:

Next, discuss your objectives for the meeting. For example:

- we want your full and frank feedback on how we're going
- we want to understand exactly what you need and expect from us so we can advise and serve you better
- we want to know about any problem areas we may need to address.

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From here, move to specifics. Select relevant topics and questions from the lists below.

01 / UNDERSTANDING YOUR BUSINESS

- How well do we understand your organisation, the business environment in which you operate, and the challenges you face?
- Have we come to grips with your concerns, problems, and priorities?
- What work do we need to do on this?

02 / QUALITY OF ADVICE

- Do we consistently provide the right advice? Is it practical and tailored to your situation?
- Is our work effective in helping you achieve your objectives?
- What improvements do we need to make?

03 / OUR RELATIONSHIPS WITH YOUR PEOPLE

- Do we always take a keen interest in your matters and treat you as an important client?
- Are our people always straightforward, direct, and honest with you, and is their behaviour always completely ethical?
- Have we formed productive working partnerships with your key players?
- Do you feel we consistently work in your interests?
- How should we improve our relationships with your people?

04 / WILLINGNESS TO HELP

- Are we always ready and willing to help?
- Do we respond in accordance with your priorities?
- Do we keep you properly informed?
- Are we easy to work with?

05 / TANGIBLES

- Are our advices, recommendations, correspondence and contracts clear and easy to follow?
- Is our technology up to the right standard?
- What aspects of the presentation of our people, facilities, premises, and documents do suggest we work on?

06 / REVIEW OF RECENT PROJECTS

- I'd like to turn to a couple of matters which we've handled for you recently to get your detailed assessment of how we've done. Taking these projects one at a time, and thinking back over the [name project/case, outline key points], what, if anything, do you think we did especially well? (Probe for details.)
- What aspects of our handling of this project fell short of your expectations? (Probe for details.)
- How do you suggest we improve our performance on similar matters in the future?

07 / VALUE FOR FEES PAID

- Does our work represent good value for money to your organisation?
- How does our value for money compare with your other firms and professional advisors?
- Are you happy with the style, frequency, and presentation of our invoices?
- What should we do to improve the value we deliver?

08 / OPPORTUNITIES FOR EXPANDING RELATIONSHIPS

- How do you recommend that we promote our services to your organisation?

09 / EFFECTIVENESS OF MARKETING INITIATIVES

- What suggestions can you offer to improve the effectiveness of our value added services and marketing initiatives?

10 / WORKING TOGETHER BETTER

- Do you perceive any barriers or obstacles to us working effectively together?
- What would we need to do to become your ideal professional service firm?

And, at the end of the interview, remember to:

- thank your client
- promise action on key items
- indicate timeframe for actions
- explain what will happen next.

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>> Ask us about our BD strategy and planning services

In an increasingly competitive professional services environment, firms need to pay a whole lot of attention to developing a clear and differentiated position and excelling at execution.

If your firm needs some clarity around business development objectives, goals, and strategies, we can help.

Our offering includes, but is not limited to:

- Internal strategy session - Around your firm in 80 questions
- External competitive positioning session - Business development benchmark briefing for law firms
- Targeted business development campaigns.

Get in touch and find out more about how we can help you.

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NOTES AND ACTION ITEMS