10 Ways to Manage Touch Points for Optimal Success

By Susan Saltonstall Duncan

Touch points—the many ways you have contact with your clients and prospects—can give positive, neutral or negative perceptions of you or your firm. Take steps to ensure your touch points are positive.

At all times, but particularly when the economy is in a bad state, effectively managing your contacts with clients and other key targets is crucial both to retaining existing business and to growing your practice further. The key is knowing what your "touch points" with clients are—and where and how you can maximize them to strengthen your relationships.

In business development terms, touch points represent the myriad ways in which you have contact with your current and prospective clients. Any of these points of contact can give others positive, neutral or negative experiences and perceptions of you or your firm. The following steps will help you hit the mark and ensure that your touch points are positive.

1. Assess Your Current Touch Points. How well and how often do you communicate with your client base? Don't limit your analysis to the frequency and type of your own contacts with them. Think broadly and make a list of every time your clients currently interact with anyone at the firm. Remember that in addition to hearing from you during the course of legal matters, clients also receive bills from you, interact with your receptionist or secretary and perhaps also communicate with a paralegal or other lawyers in your firm as needed. Also factor in any newsletters, e-mail alerts, marketing mailers or other communications sent by the firm to all clients.

2. Figure Out Where Improvements Are Needed. Now that you have a better sense of what your client touch points are, you can determine how to improve on them. For starters, call the firm's main number as well as your own office to see how the receptionist and your secretary answer the phone. Phone manners and in-person greetings should consistently be pleasant and professional. Walk through your hallways and into the reception area and the client conference room to get a fresh view of how others are experiencing your firm visually. Look over the billing format to make sure it is clear and user-friendly and gives clients the kind of detail they want. Carefully read all your invoices before they're mailed, to make sure they're error free—and if you're worried about how the client will react to any item, call the client in advance to discuss the bill. Review the other types of communication that your clients receive from the firm to be sure each is relevant and likely to be well received.

3. Protect Your Client Base. With mounting competition for business in a tough economy, your competitors will be wining and dining your clients, or trying to woo them with free or discounted services and other value-added benefits, such as introductions to financing sources. If you have been neglecting your clients in any way, this is the time to step it up! That means making sure that work quality is topnotch and your service is stellar—including providing super-prompt turnaround, immediate responses to e-mails and phone calls, and effectively managing others in the firm who help you with client matters to ensure that they provide the same stellar service.

4. Add Value. Offer to spend some off-the-clock time with clients to brainstorm about their business issues and other priorities. Make sure you understand the workings of their businesses or industries and how the legal matters you work on will affect their strategy going forward. Offer to meet with the client's other professional advisors to develop a multidisciplinary view of the client's needs and options. Always be on the lookout for ways to reduce cost and increase efficiency in your delivery of services.

5. Keep in Touch to Keep Top of Mind. If, when you assessed the type and frequency of your touch points, you found that you mostly talk to or see clients only when you are working on a matter for them, you are significantly under-touching your clients. You need to look for reasons to call them or send them an article of interest with a personal note. Take them to lunch and visit them at their offices. Get to know them personally and find ways to interact with them in social or civic settings. You should be in touch with your clients at least once a month—add a tickler to your calendar to keep yourself on track.

6. Be a Good Listener and Problem Solver. Your clients will appreciate it if you reach out to see how the economy is affecting them and what their plans are for the upcoming year. Explore their personal agendas and goals as well as their business concerns. Brainstorm about ways in which you can help them address challenges, solve problems and build successes. Discuss what additional services, resources or introductions you could provide to help them.

7. Manage Expectations with New Clients. In addition to thanking new clients for the opportunity to work with them, you want to make sure that you share and clearly discuss mutual timelines, cost estimates, billing processes, and project management and cost management procedures. Ascertain how and how often clients want to be communicated with about ongoing matters and strategies. Then check in regularly to see how the engagement is going from the management perspective (versus the legal perspective).

8. Conduct Satisfaction Surveys. Have a formal meeting with each client on an annual basis to run through a series of questions about how you and the firm are performing in these crucial areas: quality, responsiveness, timeliness, value, creativity and cost-effectiveness. Encourage a stronger partnership by seeking ways to improve services in collaboration with the client. At the close of each matter, ask clients to complete an end-of-the-matter survey, or alternatively, make a phone call to them to debrief. During every call with a client, ask if there are any issues or concerns relating to your work—and listen carefully and openly to what the client has to say.

9. Show Your Gratitude. Remember to thank clients for being your clients. Tell them how much you appreciate their business and like working with them. In addition to an annual holiday card and a birthday card, send a handwritten note any time a client refers someone to you. You might also consider sending clients a small gift at the end of the year (again, with a personal note) or perhaps making a donation to the client's favorite charity. Also, whenever you can, don't forget to refer others you know to the client, either as new customers or as potential resources of value to the client.

10. Spend a Little Time Every Day. Most clients still tend to hire and retain lawyers whom they know, like and trust. But maintaining these relationships takes effort. If you fall out of sight, you are quickly off their radar screens. You need to dedicate at least two to three hours a week connecting and reconnecting with clients and other important contacts by phone and in person—don't forget that face time is still the most effective way to keep a relationship going. Now is the time to be certain that you aren't taking clients for granted and you're doing all in your power to increase the frequency and effectiveness of every touch point you have.

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