

# How Independent Client Listening Works Inpractice.<sup>1</sup>

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*“For the smartest firms the opportunities are waiting to be seized, but it will take a dynamic and questioning mindset and an ability to look at the business from the client’s point of view, to be consistently successful.”* (The Age of the Client – LexisNexis Bellwether Report)

## 1. Choose the Clients (and Referrers) for a Pilot Project

The first step is to identify a group of key clients or introducers. They may well NOT be – and rarely are - your biggest clients or clients producing highest fees. You want clients where you and your colleagues believe there is untapped potential or perhaps where the relationship is at risk; or where you believe “there’s something interesting going on”. We can work with you to segment your client base and to identify an appropriate list of businesses to work with.

There is no minimum number of clients. The best way is to start with a “pilot” with a small group of clients. You don’t need a big number first time around when you launch your first pilot. 10 would be good; 5 or 20 is possible and bear in mind that this works well for referrers and business partners too.

It is good to get buy-in from your partners, but there is a real risk that seeking consensus from too many people can mean nothing ever happens. At the outset, choose clients from the team or group of lawyers that keen to innovate. Get them involved and engaged in the pilot and then share the successes widely across the practice. Other people will follow once they begin to understand how this works. Few do at the outset.

## 2. Client Relationship Audit - Get Your Key Client-Facing People Engaged

We help you to conduct a relationship review of each client we intend to contact, sitting down with each of your lawyers responsible for each of the clients you want to involve. We aim to get a feel for the current work and relationships, to agree objectives and some key points you might want us to cover during the meeting, which we incorporate in a “Discussion Topics” document. It will include some key questions, but also identify wider areas to explore where appropriate.

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<sup>1</sup> This is part 3 of a 3-part series of short articles, we explain how law firms are using “independent client listening” to generate new business, strengthen ties with clients (referrers and business partners too); to develop new service propositions valued more by clients, innovate on service delivery and develop a client-focused culture across the business. It helps lawyers to find tangible new ways to differentiate from competitors and future-proof relationships with clients.

### 3. We research the business, the people, relationships

Not just the business and their market, but also the individuals involved, their relationships and other advisors, so far as the information is available. It's surprising how often this throws up useful connections that lead to new opportunities. We generally know more about the business than our law firm client at this stage and can then extend the Discussion Topics document.

### 4. You get agreement for us to engage

Generally, this involves a telephone call from someone at your practice – usually the partner in charge of the relationship or the managing partner / CEO – to the key contact at the client who we are to meet. You explain the positive context for the proposed meeting along the lines of ... “to identify opportunities to constantly develop and improve our services to match your changing needs - and to ensure meaningful engagement to deliver these improvements. “

The client agrees to us making contact and you hand it over to us from there. Generally, 8 or 9 out of 10 clients will agree to take part. The reason for others not doing so tends to be lack of time, so you can always come back to them in the future, hopefully having told them more about what improvements were initiated so far from these sessions.

### 5. We engage with the client; and meet them.

First contact is generally made by email, referencing the lawyer's conversation with their client, re-iterating the same positive message and proposing a meeting at their offices, which may last up to 45 minutes. These meetings often over-run because the people we interview get so engaged in the discussion and we are pleased to allow that to happen.

It can be useful to share a copy of the discussion topics at the meeting (but rarely before) to help keep us all on track, but making very clear that we expect to veer away from it when there is something worth exploring outside of that. It's a good opportunity to make sure they understand that nothing is “out of bounds” in this discussion and to talk about confidentiality.

Other guidance to bear in mind during these structured meetings:

- **It is critical to “listen actively”**; to allow the CEO / FD etc to express themselves, but to take the right opportunities delve deeper into their thinking and not let these opportunities pass by.
- **We start with a clean sheet**, largely avoiding discussion of the current operations, to avoid getting bogged down in historic detail. We want to look forwards and anything they want to discuss is on the agenda.
- **We ask open questions and invite candidness** to the most we can out of the discussion.
- **There is no effort to sell legal services** and we avoid any “defensive” comments
- **We focus on looking forwards**, not (just) backwards (although some historic information can warm the discussion at the outset. Our initial interest tends to be on their challenges:
  - In the business – what is happening in their world
  - Running the business – what does success look like
  - Their role, their life – what keeps them awake

I have never had any adverse reaction to these meetings from anyone I have interviewed. The feedback has always been positive. Even when the MD's and CEO's have found the discussion challenging, it has been positive; and we have learned how to use "Columbo moments" in the right situations to gather as much candid thinking from the people we meet as possible.

## 6. Show Your Appreciation

It is important at this stage for you to say thank you to the client for their time and for you to give them a timescale for your proposed response, saying no more than that at this stage; allowing enough time to follow through all the steps outlined here realistically.

It is best to complete all the interviews to be able to identify any trends before reacting to one or a few isolated comments, so we prefer to only report back when we have completed all interviews. However, if there is clearly some issue or opportunity that needs to be addressed immediately, we would of course report that back immediately to enable you to respond.

## 7. Report, Findings, Conclusions & Workshops to Explore

Another area where objectivity and independence adds to this exercise is in the production of our report, which your lawyers should accept as unbiased and fair, whatever it says. Also in our ability to challenge established perceptions within your practice in workshop sessions that usually follow. There we help you to explore the conclusions, stretch ambitions, agree action for each client and the steps required to ensure they are carried through.

## 8. Further Internal Workshops

It is likely that further internal discussions will take place to agree and begin to implement agreed action from the exercise; for the individual clients involved and more widely, taking full advantage of the lessons learned.

## 9. Report to Client & Action

Having agreed the actions to be taken as a result of the various discussions, it is essential that your people go back direct to each client to tell them about your plans, get their agreement and further input to refine and introduce whatever actions are proposed. How this is done depends on the circumstances. It could be just an email or letter; it is more likely to be a meeting, or even a workshop involving them. There are occasions when no action is appropriate, but they are rare. Even then, it is essential that your team respond to your client and tell them so. In most cases, there are

## Getting Started, Making It Happen

- **Do this right at the beginning of any initiative** that is likely to influence or impact on your relationships with clients and referrers. Initiatives where this kind of input can be particularly helpful are likely to involve marketing strategy, online services, process improvement, implementing CRM systems or Key Account Management and innovation more generally.
- **Get buy-in from the senior management team;** and more widely from the people who manage clients that are likely to be involved in a pilot, so far as possible. However, you don't have to

wait until all are on board from the outset. If the pilot client listening exercise is managed effectively, with insights gathered and successes shared, others will readily buy in for the future.

- **Accept that not everyone is going to want to do this**, but the people that resist it are unlikely to be the right people to manage client relationships in the future. That begins to show itself.
- **Let us help you decide how to segment** and select the clients for a pilot project.
- **JGDI – just get on and do it**; don't waste time thinking too deeply about it. At this stage, you don't know what it will produce, but there is no doubt that lawyers need to listen harder to what clients want.
- **Don't just do it as a one-off**. If the pilot is successful, you will find that Independent Client Listening can be used very effectively in a wide variety of situations to help develop your business. It should be a resource that every firm should use one way or another as a matter of routine.

For the rest of this series see:

[PART 1: Why Smart Firms Listen to Clients](#)

[PART 2: Why "Independent" Client Listening Works Best](#)

**For more information or to discuss how this could work for your practice - in confidence and with no obligation - contact Allan Carton on 07779 653105 or at [acarton@inpractice.co.uk](mailto:acarton@inpractice.co.uk)**

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