7 STEP CLIENT EXPERIENCE AUDIT

INITIAL CONSULTATION

"Treat it like a Broadway Show"

The actors in a Broadway show have done the same performance, hundreds of times, but yet when you watch them, it looks like their first time, every time. Make sure your initial consultation doesn't seem like your 1000th show.

PRO TIPS:

- Show care & attentiveness in your language
- Make sure to send a follow up text or email (within 3 hours) after the initial consultation.
- Remember personal details that you can refer back to during the next conversation.

CLIENT ONBOARDING

A frictionless and efficient client onboarding process can help to set the tone for the entire client journey.

This can include providing clear and easy-to-understand information about the firm's services, as well as gathering necessary information and documents from the client.

PRO TIPS:

- Always clearly define the next steps for your client and give them an open line of communication.
- Provide a simple checklist for your clients if you require multiple types of documents. This may reduce any unnecessary touch points.

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COMMUNICATION

Many Bar complaints are due to poor communication.

Make a list of all the individual "touch points" in your client journey and make a conscious effort to improve them.

PRO TIPS:

- Maintain regular and open communication - give consistent updates in case developments.
- Make sure your firm is fully accessible to clients based on their desired communication style. Clients or leads should be able to reach a human 24/7/365. They should have multiple options for communicating with the firm/attorney including email, video, text and phone call.
- Provide clear expectations during client onboarding. Let them know how to best communicate with you and typical response time.
- Make note of all communication within the client's file so that staff in the firm are aware of what's been discussed and what hasn't. Try not to make a client repeat information they've already provided.

TECHNOLOGY

Leverage technology to streamline communication and paperwork. Enhance your methods of communication by using V-Mail (video messaging) vs traditional email. Video builds faster connections, rapport and trust.

PRO TIP:

- Explore V-Mail as an additional form of communication.

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PERSONALIZATION

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." – *Maya Angelou*

Make an effort to personalize interactions with clients to help build trust and loyalty. Increase your listening attentiveness by 10% in client conversations.

Pro TIP:

- Take notes of personal details about your clients that you can refer to in future conversations. Note their unique needs & concerns, family member names etc.

BILLING AND PAYMENTS

Transparency and clear communication around billing & payments can help build trust and avoid misunderstandings.

Pro TIPS:

- Avoid additional fees or surprise expenses.
- Provide a clear outline of the billing journey and financial expectations.
- Let the client know how they can pay you- provide links if online, billing address if mailed, or phone number to call to pay via card over the phone.

FOLLOW UP AND AFTER-CARE

After case conclusion, follow up to ensure client satisfaction and address any lingering concerns.

Providing after-care services such as providing resources or referrals can also build trust and loyalty.

Pro TIPS:

- Send a handwritten thank you card.
- A week later, email to request a testimonial of their experience. Provide any necessary links if applicable.