



**LexisNexis®**  
**(LIVE) Improving client relations  
in a competitive market (2020)**  
**18<sup>th</sup> February 2020**

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**(LIVE) Improving client relations  
in a competitive market (2020)**  
The law as stated during this webinar is  
up to date as of **18<sup>th</sup> February 2020**

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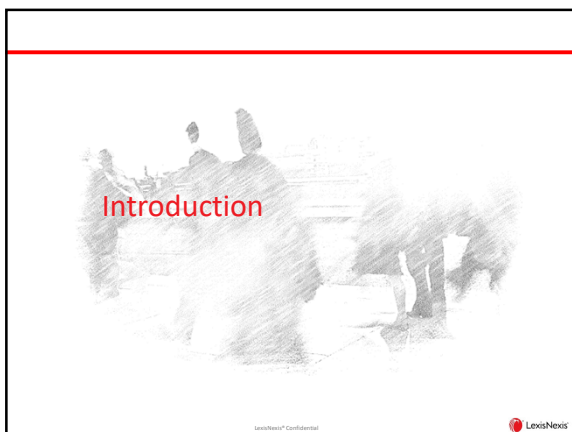
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**Introduction**

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**Vince Stevenson**  
Founder and Director  
College of Public Speaking London Ltd

**Sally Dyson**  
Founder and Director  
Firm Sense

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**Introduction to Vince Stevenson**

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- College of Public Speaking London Ltd
- Based at Euston/King's Cross
- Training in:
  - All things public speaking
  - Executive coaching
  - Training the trainer
  - Leadership and management
  - Personal development
- National and International assignments

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**Introduction to Sally Dyson**

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- Services:
  - Coaching
  - Client Listening
  - Training
- Sally Dyson is the founder of Firm Sense, a specialist consultancy enhancing the effectiveness of professionals.
- Sally is the author of three business books for lawyers:
  - Budgeting and Negotiating Fees with Clients: A Lawyer's Guide
  - Client Listening: Why it Pays and How to Do it
  - The Real Deal: Law Firm Leadership that Works
- Credentials:
  - Qualified and practised as a solicitor at Slaughter and May and in-house.
  - Trained in business coaching, psychometric testing, interview techniques, and Lean Six Sigma

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Agenda

- Understanding the client experience
- Differentiating yourself through getting the basics right
- The art of client communication
- What really matters to clients with examples of good and bad practice.

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Understand the client experience  
What are you like to deal with?

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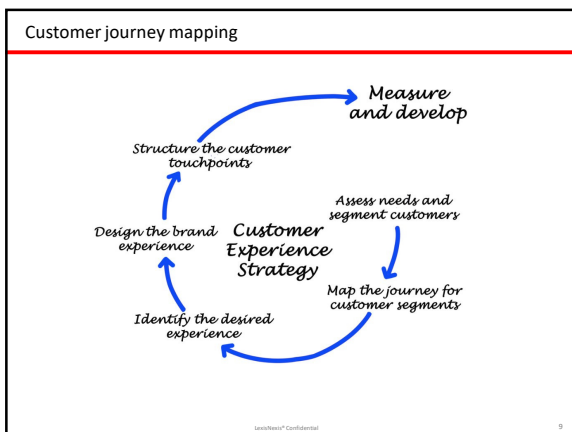
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Getting the basics right  
Still a game changer

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Pitching to win

Answer RFP questions precisely      Demonstrate interest in the client



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Taking away the pain of client on-boarding

- Address and identity verification
- Conflict checking
- Signing terms of engagement



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**Avoiding nasty surprises**

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- Time and budget over-runs knock clients for six.
- Why do lawyers find it so hard to discuss fee adjustments with their clients?
  - Insufficient monitoring
  - Embarrassment about rates
  - Fear of client reaction
- Address issues early for best outcomes.



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**The art of client communication**  
Effective writing

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**Writing with impact**

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- 1) agree on timing and content headlines
- 2) write a strong summary
- 3) write for clarity (reduce jargon/acronyms)
- 4) make it easy to read (space it out)
- 5) professional accuracy / numbers / evaluation
- 6) reflect your brand and brand values
- 7) present report for acceptance by your client

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1 Dec 2019 - 31 Dec 2019

Overview

### December 2019 Overview

**Summary**

In this period, the Google campaigns generated [redacted] in revenue while the Bing campaigns generated [redacted].

The website generated [redacted] in revenue in total in this period. This represents a decline against the previous period, however, this is to be expected, as website activity declined in the second half of the month across the board in line with the Christmas and New Year period.

The Facebook campaigns generated 4 direct bookings and 140 email sign ups for a total spend of [redacted].

Four email campaigns were sent in December. Email generated [redacted] revenue in this period.


**Key Activities**

**Google**

In December we searched for potential new keyword opportunities and also account wide for negative keywords.

We increased bid adjustments to +30% for computers and excluded tablets based on historical conversion data.

We created two Microsoft Ads campaigns for Leadership and Management and Speak Out and Inspire.



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## What really matters to clients

Lessons from experience

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### Client Relations – Case Study 1 – ActionCoach

#### A source of support

- My business coach and his company - Fee £2000 + VAT per month
- Twice monthly updates – 1 hour every two weeks
- Advice on running the business/marketing – experienced practitioners
- Detailed notes of meetings/actions prepared and distributed
- Quarterly planning meeting at big hotel for 150 coachees
- Excellent networking opportunities
- Exchange cards/company materials/exchange company updates
- The occasional meal out where personal issues are discussed
- Outing to Twickenham to watch England

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**Client Relations – Case Study 2 – Grugeon Reynolds - £250 + VAT pm**  
**Delivering enabling services**

- 1-2-1 access to the senior partner - dates agreed in advance
- Regular meetings with my accountants scheduled at mutual convenience
- Access to PAYE, VAT and Corporation Tax staff/advice
- Regular monitoring of bookkeeping activities (Xero)
- Introduced me to my IFA. Monthly breakfast meetings re tax developments.
- Prepares and distributes minutes of meetings/action points
- I feel comfortable talking to him about anything
- Gives me one large bottle of expensive wine every Christmas

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**Client Relations – case study 3 – Clark St. James - £2500 + VAT pm**  
**Winning new business through canny digital marketing**

- Regular meetings with my digital marketers scheduled at my convenience
- This a remote relationship
- Google Adwords, Microsoft Bing, Facebook Ads – email campaigns
- Tracking and reporting of digital progress across platforms
- Updates to web pages/back end CRM database
- I feel comfortable talking to him about business
- Gives me one large bottle of gin every Christmas

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**Client Relations – case study 4 – VAI - £4000 + VAT pm**  
**Client pleasing location boosting the bottom line**

- Relationship with room hire administrators – respect, work closely
- They are our supplier – we are their principal hirers
- Without the appropriate rooms available – it would create a lot more admin
- Book rooms a year in advance – they're flexible with us
- Tidy room after class – work closely on any issues
- Respect the venue's other room hirers and staff members
- Offer free training to charity and voluntary organisations working there
- Remember birthdays, Christmas gifts (token gifts). Personal touch

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**Client Relations – other opportunities**

- As a freelancer, the freelancers played football against the permanent staff at Luton FC
- Sponsorship of a 3 Peaks Challenge by agency for permanent staff
- Dragon boat event at Henley
- Corporate Challenge – we've invited Executive students to be judges of the event – they feel valued and respected
- Karaoke evenings with dinner
- Barcelona – speaking on the beach, in a cable car, in a beach café, Picasso museum, Sagrada Familia, restaurant in Las Ramblas – anywhere but a classroom
- Be creative – dinner at the Ritz followed by a West End show

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**Summary**

- Stand in your clients' shoes. What are you like to deal with?
- Map the customer journey or consider these pain points:
  - Pitching for business
  - Client on-boarding
  - Deadlines
  - Budgets
  - Communications
- Make sure that you:
  - Support your clients
  - Deliver the services that your clients need
  - Provide services that are effective and impactful
  - Pick an accessible location if you meet clients face-to-face
  - Deploy a little creativity

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**Upcoming Personal Skills webinars**

- Enhancing analytical and logical reasoning skills (2020) – 23<sup>rd</sup> March 2020

**On demand Personal Skills webinars**

- Asking for a referral (2020) – expires 3<sup>rd</sup> February 2022
- Improving client relations in a competitive market (2020) – expires 18<sup>th</sup> February 2022



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13	Client report	CLARK ST JAMES	VS does not expect any objection to use.

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### Thank you and reminders

- This webinar is designed to help solicitors meet requirements A2 (Maintain competence and legal knowledge) and A4 (Draw on detailed knowledge/understanding) of the SRA's Statement of solicitor competence. You may also use the quiz, which can be accessed via the "Take a quiz" link on the webinar details page, to reinforce your understanding of the webinar content. You should answer 7 out of 10 questions correctly and will have two attempts at the quiz.
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- This webinar will be archived immediately, and will be available to view on-demand for 24 months.
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**Thank you for attending.**  
**We hope you've enjoyed this session.**



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