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Getting the client relationship review meeting right

By Linda Julian

Winning new clients is harder and more costly than ever. Developing and deepening relationships with "right fit" established clients is an increasingly attractive and effective business development strategy.

Our extensive research confirms that most substantial clients value - and expect - periodic relationship reviews.

We are often asked how to conduct an effective client relationship review meeting. Getting these meetings right is very important. Feedback obtained is essential input to:

- improve service delivery
- future proposals
- reveal risks for you to address
- uncover business development opportunities.

Relationship reviews conducted by high-level partners can be great relationship builders, especially if carefully planned and executed to elicit frank, forthright and fierce feedback. Expert, independent facilitation often proves invaluable.

First, the basics:

- have a clear agenda
- plan a series of "open questions"
- thank attendees for participation.

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...

From here, move to specifics. Include topics and questions selected from this list:

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?

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?

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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?

Willingness to help

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

Tangibles

- Are our letters, opinions, advices, 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?

Review of recent cases

- 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 cases one at a time, and thinking back over the .... (name case, outlining key points) case......................, what, if anything, do you think that we did especially well ? (Probe out fully.)
- What aspects of our handling of this case fell short of your expectations ? (Probe out fully.)
- How do you suggest we improve our performance on similar matters in the future?

Value for the fees paid

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

Opportunities for expanding relationships

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

Effectiveness of marketing initiatives

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

Working together better

- Are there barriers or obstacles in working effectively together?
- What would we need to do to become your ideal professional service firm?

At the end of the interview

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

Getting all-important client relationship reviews right will help you along the path to a pre-eminent position as preferred legal services provider and strong competitor.

About the author
Linda Julian is acknowledged as a leading authority on strategic practice development and how to win business for law firms. Since 1979, she has consulted with lawyers and other professionals throughout Australia, New Zealand, the Pacific, and Asia on a wide range of business acquisition, client retention, and strategic management issues.

Her book The Passionate Professional: creating value, success, and prosperity has sold in 13 countries and has received wide acclaim. Linda lectures in strategic management and marketing professional services at post-graduate level. She leads the small and highly specialised Julian Midwinter & Associates consulting practice.

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