What Are Client Teams and How Can They Be Used?

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Legal Marketing 2.0 Podcast

In this episode of the Legal Marketing 2.0 Podcast, Guy Alvarez is joined by Kelly Harbour to discuss the use of client teams to drive success at law firms. Kelly is the Chief Business Development Officer at Goulston and Storrs. She has more than twenty years of experience in marketing and business development along with almost fifteen years of experience in the legal industry. She is passionate about data driven decision making and spends her free time working for the SALI Alliance, a non-profit that helps to uphold legal standards.

1. What is the concept of client teams?

Groups of people, that would include paralegals and other members of the professional staff, who are working to strengthen and grow a client relationship. So the most basic client team function is to share information about the clients and their business and then the structure and framework of the teams can grow in sophistication from there, so that further along the spectrum, you would have something called a strategic account. They are a smaller number of people who have identified specific, measurable goals to grow a client relationship and who are actively pursuing those goals.

2. Why should law firms consider client teams?

So minimally if you have client relationships that span practices or offices, you want to have a client team, so that you can be coordinated. Sort of at baseline you want to avoid looking disorganized or uninformed about the scope of work that the law firm is doing for a client. But beyond that a sort of baseline function you can really mobilize resources around adding value to client relationships in ways that will ideally foster loyalty and deepen the client's relationship. The other important benefit from the law firm side is the more deeply entrenched a client is with your firm and the more tightly woven together your organizations are, the less portable the business is. The more you're working with a client, the more deeply the team understands the client's business and it's not just about a single person and their capability or their understanding of the client's business. You're protecting against succession and transition on both sides.

3. How often is the client actually involved?

We have a formal feedback program where we form client feedback interviews and have a matter debrief for significant matters at the firm. So we bring in the clients for the interview which is conducted by me and our co-managing partners and others in the marketing business development team. Having the client speak directly to the team is something that we're doing more and more of.

I think once a year is probably right, again just depending on each client for the circumstance, but having that sort of once a year check in to talk about plans for the year.

4. How do you scale applying the team program?

You're dealing with limited resources and limited people in the marketing business development team that can support these teams, so you want to be able to provide the right types of services, you want to make this a good experience for the partners so that they tell their friends, they want to have a client team and what the benefits are, and so you have to know your limitations in terms of what you'll be able to do well. And you also have to appreciate that not all teams are created equal. Some teams just won't require as much effort as a team that's meeting quarterly to share information and stay coordinated. Just really thinking through and actually sort of classifying whether on paper or just in your head, these are sort of the client teams light, these are sort of the middle of the road bell curve of client team support and then, on the other side of the bell curve you've got the strategic accounts that are going to require a larger time investment.

Takeaway:

Client teams can be a powerful tool to foster a deep sense of client investment and immersion within the firm. Some client teams are low maintenance, whereas others take hefty amounts of time and effort. Either way, utilizing client teams can take your firm's business development strategy up a notch with its client-centric format.

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