

Onboarding and the Client Experience

By Nat Slavin



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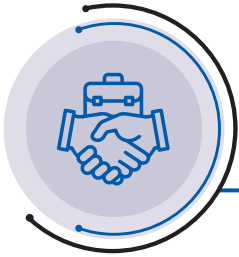
A signed engagement letter and an assessment of conflicts. For many firms, that is the client onboarding experience. But those firms are setting themselves up for misaligned client expectations and lost opportunities.

When a new client begins work with a firm, that firm has a chance to learn valuable information about the client's needs, goals, priorities, and preferences. By clearly establishing expectations for how the firm and client will work together at the outset, the firm minimizes frustrations on everything from billing practices to communication and demonstrates an investment in the overall relationship.

Setting a clear and high client service goal is the most important reason for thoughtful onboarding, but it's not the only reason. Successful client onboarding is the firm's chance to convey its values to its clients and show it is looking for more than just a new billing opportunity. Even better, successful onboarding unlocks the information (primarily around non-billable ways to add value and extras beyond the work at hand) that will create long-term opportunities for client loyalty, competitive advantages, cross selling and new business.

Wicker Park Group has interviewed thousands of clients with a wide range of experiences onboarding a new firm. Those experiences make it clear that the most successful firms are setting the tone for the client experience before the work actually begins. Too often, firms make commitments and promises and then miss the opportunity to confirm alignment around needs at the onset of the actual working relationship. A formalized onboarding process goes a long way towards confirming needs of clients and delivering differentiated client service.

The following strategies (based on real firm and client experiences) will help you think through what your onboarding should look like, how to put the process together, and which benefits the firm will accrue as it implements an onboarding strategy.



What Onboarding Looks Like

One of our favorite sayings at Wicker Park Group is: “One size fits one.” This is true for firm clients, and it’s also true for firms and how they handle internal processes like onboarding. Some firms have a dedicated person in administration or client service who conducts onboarding client interviews. Other firms dictate that each partner oversee the onboarding of his or her individual clients. Either option requires internal firm training that ensures all clients have a uniformly positive and helpful onboarding experience.

Some firms have a “welcome packet” (electronic or hard copy) that every new client receives with helpful firm information. Others create a document

that each new client fills out with needed information. And some firms take the onus off the client to fill out a form and conduct the onboarding exercise by simply picking up the phone and calling the client.

The process can look very different based on firm capabilities and needs, but what matters is that the process results in mutually agreed-upon expectations and protocols that will inform the creation of a custom service or account management plan.



First Steps and Outside Counsel Guidelines

The first step for any firm with a new client is understanding how the firm was hired and what acknowledgements should be made:

- Do you need to send a thank-you note to a referral source?
- Are the appropriate people at the firm and the client aware of the engagement?

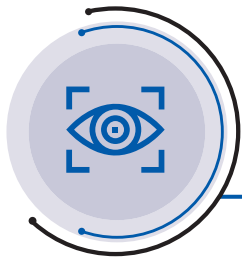
- Who at the firm will oversee the onboarding process, and what introductions need to be made to facilitate that?

Then determine how to best gather the needed information from the client. The firm may have a set process in place (as described above) or may determine client preference, i.e., a phone call with a firm contact or an electronic document to fill out.

Next, review any outside counsel guidelines. Are there any you might not be able to meet that need to be addressed?

Whether there are outside counsel guidelines or not, are the primary contacts at the firm aware of any information that would be helpful to

others at the firm? This may include any existing relationships with client contacts (socially or through other networks), company history, newsworthy items, client minefields or under-the-radar challenges, etc.



Four Areas of Focus

Onboarding for many firms focuses on three important areas: communication, billing, technology, and relationship mapping.

1. Communication

The ability to communicate efficiently and effectively with clients is one of the most important skills for any attorney. As one client said in an interview, “From a relationship perspective, it’s important to me to be transparent and have conversations around expectations. It’s all about openness and transparency and having ongoing conversations.”

Firms save themselves much frustration down the road by understanding communication expectations up front.

Some questions to consider asking clients include:

- How do you prefer to communicate with outside counsel (email, phone call, text)?
- How frequently do you want us to communicate with you regarding the status of this project?
- Do you have anyone internally who manages legal projects?

- Who needs to be included in various communications?
- How do you communicate with each other in your organization?
- What is your definition of responsiveness internally and with your outside partners, vendors, and advisors?
- If we are regional counsel and you have primary counsel in the same area, are there updates you want us to send to other counsel as well?

Best Practice: After the first billing cycle or within the first quarter of working with a new client, schedule a follow-up call to determine if any adjustments need to be made.

In addition to gathering this information, provide the client with a firm contact sheet that includes contact information, photos, and areas of expertise for people including:

- Primary relationship attorneys
- Associates, junior attorneys, and paralegals on the client team
- Client relationship management (i.e., COO or chief client care officer)

- Billing and accounting contacts
- Technology contacts

Best Practice: When lawyers join the firm, send an updated contact sheet with an introduction of who the new person is and the role they will play in the relationship.

2. Billing

Many in-house legal teams face the challenge of providing excellent legal solutions despite significant internal cost pressures. What no in-house team should be dealing with is the headache of problematic billing processes. Problems that come from firms failing to meet billing guidelines or manage bills are significant threats to healthy relationships.

Said one unhappy client in a 2022 interview: “We’ve had issues when we didn’t even know there were aged bills, or we get bills we never agreed to. I’ve been asking for monthly statements so I can catch where they think they sent bills that I never got. That is a solution that I’m coming up with, but I shouldn’t be having to do this. I shouldn’t be the one to make recommendations on how we should operate moving forward. Billing has been a thorn in our side for some time.”

Some questions to consider asking or confirming with the client include:

- Do you have outside counsel billing expectations that are not included in outside counsel guidelines?
- If we handle multiple matters, would you like to be invoiced separately or would you like them consolidated into one invoice?
- Do you want regular rolling updates on fees against budgets?
- How would you like us to update you on forecasted changes in anticipated or budgeted fees?

- Are you currently using a third-party billing service? If so, please provide the contact information for the billing coordinator.
- Who will be the main Accounts Payable contact for your invoices?
- Would it be helpful to coordinate a conversation between our billing professionals and your legal operations team?



Bonus Tip: As time goes by, clients sometimes change their corporate name. Make sure all invoices use the current client company name!

3. Technology

Similar to billing processes, clients often don’t think about technology unless it’s causing problems. While excellent technological solutions can dramatically enhance a client/firm relationship, the opposite is also true. And our post-COVID increased reliance on technology only leaves more opportunities for user error.

Use the onboarding process to ask questions including:

- How do you currently use technology to collaborate with outside counsel?
- What technology solutions are most useful/most needed?
- What are your security requirements/guidelines?
- Which of our firm’s technology solutions are you interested in utilizing?



Bonus Tip: Create a standalone guideline and best practices resource for how clients can use the firm's technology resources.

4. Relationship Mapping

A relationship mapping exercise allows the firm to connect appropriate contacts. Outside counsel need to understand who does what at the client and who at the firm should know that person. This is challenging to do at the onset of a new client relationship, but the first steps can be taken by asking some primary questions, as noted above, and then connecting them to the right firm contact.

At the base level, this is about connecting peers to peers. Often the people doing the work are different than those that assign the work. Making sure relationships are mapped and updated—and ensuring individual goals, responsibilities, and priorities are noted in the relationship map—is an essential component of client service.

The relationship map will also include contacts in accounting, legal project management, internal communications, etc.

It also should include subjective definitions of the roles people play at the client; those may include decision makers and influencers. Also, it is important to note who at the client serves internal clients and who those clients are. When in-house counsel represent various business people at the client, those internal clients also have needs and priorities. Once the relationship map is complete, then preferences, as noted above, can be defined for the various “sets” of clients.

One key differentiator of highly loyal clients is a relationship that extends well beyond one person at the firm and one person at the client. Multiple relationships among multiple contacts at the firm and client will help the firm deliver a better work product and make the relationship stickier.

Make sure the contacts on the relationship map are also included in the list of contacts provided to the client (as discussed in the “Communication” section).



Bonus Tip: In the first few months of a new relationship, it should become evident who at the firm can get the answers to the questions that need to be answered! This is often an executive assistant or paralegal. Create a cadence of regular check-ins with that person to see if they have feedback on how the firm is doing in the management of the relationship.



Value Adds: Opening Doors to Deeper Relationships

In addition to asking the questions that will create a solid client service foundation, the onboarding process is also an opportunity to determine what the firm can offer the client beyond the work product.

In today's competitive legal landscape, one big differentiator is added value, which can take any number of forms—trainings and education, proactive market insights, networking support, and business referrals, to name just a few. Clients greatly appreciate value adds, and this is the ideal time for firms to find out which value adds are most needed by the client. Oftentimes, the definition of adding value is subjective; here are a few client comments about how they define adding value:

- “Provide a strategic planning session at the beginning of the year and share best practices of other clients.”
- “Adding value means thinking about and pointing out stuff we are not thinking about. It means looking through things with the business lens and being proactive as a problem solver as opposed to just highlighting legal problems.”
- “It's great when [the firm] asks us if we are interested in a training or update, but it's so much better when they say to us, 'Here's three topics that we think would be interesting to you and your team, would you like us to do a webinar on any of these?'”

Use the onboarding process to provide new clients with an inventory of thought leadership, training opportunities, newsletters, and webinars, and let the client sign up for desired communications based on areas of interest. In addition to those value adds, ask about supporting the client's community partners and/or professional networks. And determine the client's level of interest in (and any potential rules around) social engagement and entertainment.

Each of these value-adds allows the firm to demonstrate its investment in the relationship and broaden the client's exposure to the firm. They make your clients' lives easier, and that is a crucial component of any loyal relationship.

Don't expect immediate results, but in the long term, these interactions foster opportunities for cross selling and new business.



Bonus Tip: Whenever possible, do trainings and CLE programs in person and make sure to always ask, “Who else should be invited to the program?” It's a tremendous opportunity to meet people at the client that you otherwise may not have an opportunity to interact with or meet.



The (Crucial) Final Steps to Onboarding

Once the questions have been asked and the information gathered, don't neglect the final steps of the onboarding process. Some of the questions that need to be asked include:

- How will the firm communicate responsibility of various tasks?
- Who needs a copy of the client's feedback?
- When does the firm need to schedule a check-in call to ensure all communication, billing, and technology expectations are being met?

In addition to asking those questions, address any client expectations that cannot be currently met and have a collaborative discussion with the client about how the need could be met and what it will take (including how long) to institute the necessary solution.

People at the firm who will likely need onboarding information include:

- Firm leadership
- Practice group leaders
- Client team leaders

- Other lawyers who serve the client
- Accounting/billing department
- IT department
- Business development/marketing teams

Most of these people will need at least some piece of the information gathered, and someone will need to own each of the tasks.

Becoming a trusted outside counsel is never a quick or easy process. It takes time and effort to get to know your clients, their preferences, their businesses, and their specific needs. But while gaining that trust and loyalty takes time, it's much more likely to come from a relationship with a strong foundation. Thoughtful client onboarding creates that foundation.

- Big Picture Questions to Ask New Clients:

- How will you know you made the right decision in hiring our firm?
- What is the most successful outcome for this matter?
- What are your outside counsel guidelines and policies?
- Would it be helpful to have an in-person kick-off meeting to introduce team members at the client and the firm?

- Questions to Help You Add Value:

- What industry conferences and resources does your team value? Should we consider participating?
- Are you interested in receiving news, legal alerts, blog posts, educational program or other invitations from our firm? What specific topics interest your team?
- Do you find value in networking? What networking groups are of interest?
- Are there any technology solutions used by the firm that the client could benefit from...or vice versa?