



Client service – we're all in it together

Anna Lake believes that client service is everyone's responsibility – not just fee earners and marketing.

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The adoption of client service strategies within professional service firms is varied. For some excellent client service is synonymous with their brand and is well embedded in their internal culture whilst others are at an earlier stage of adopting a client service focus. The business case for client service should no longer be debated. Strong technical expertise is now a 'hygiene factor' for clients – they expect it of their advisers, but service delivery can really stand one firm apart from another.

Wherever a firm might be on its journey, it's important to highlight that delivery of excellent service is not just the responsibility of fee earners and that non-client facing teams have an important role to play too. The 2018 KPMG Nunwood report *'Tomorrow's experience, today'* found that one of the success factors for brands with the highest customer service ratings was 'connectiveness across their ecosystems and partnerships' – ie. all their staff are empowered to deliver on their customer promise.

The marketing department is the natural 'home' for client service initiatives and a firm's marketers are usually the ambassadors for and guardians of client service initiatives with responsibility for running client feedback programmes, communicating success stories internally and externally and, on occasion, delivering the difficult news to partners that their or their team's performance hasn't met expectations. It is their delivery of these projects as well as more traditional client facing activities such as events which make marketing's role in client service absolutely crucial.

But whilst it's easy to see the marketing team's contribution to client service, what about the rest of the firm's internal departments?

IT departments often have a bad time. They bear the brunt of partners' and staff frustrations when systems are down for repair or staff working remotely can't access files or they've run out of spare laptops when yours needs fixing. They are often firefighting in order to fix issues for their own internal customers (and this is a necessary role) but they should also have the opportunity to develop technology solutions that make it easier for clients to work with the firm.

'CX' in a B2B setting is becoming increasingly important and the introduction of systems and applications which ease and enhance your clients' 'journey' should be considered as part and parcel

of the service a client receives. Additionally, the 'Legal 500' looks at 'commitment to IT and the use of IT to improve client services' as part of its rating system so firms striving for inclusion in such league tables need to look at ways their IT teams can act as an enabler for excellent client service.

It is not just IT who are responsible for ensuring a smooth 'journey' for the client. Whilst of course protecting the firm and its integrity, risk and compliance teams need to make take-on processes and other checks as easy for the client as possible or firms face the risk of gaining a reputation for being difficult to work with.

Empowering teams to deliver a high level of service in a manner which is tailored to the needs and preferences of their particular client is an important facet of a client service strategy, but clear parameters need to be in place. Risk and compliance teams should draft and communicate policies around acceptable practices (in particular around hospitality and gifts) and the consequences of not adhering to these.

HR and learning and development teams are pivotal to instilling a client service culture within a firm, across all interactions with current and potential employees. Recruitment materials should highlight the firm's commitment to client service and interview questions relating to service should be adopted. When an individual joins a firm (as a graduate or an experienced hire and as a fee earner or in a business support role) they should, as part of their induction, receive training to help them understand the firm's client service approach and how they can apply it to their own role. An objective around providing excellent service should be considered for all partners and staff and annual appraisal processes should provide an opportunity for staff to highlight examples of their commitment to and delivery of client service.

Programmes and structures to highlight and reward examples of excellent client service delivery generally sit within HR with support from marketing/internal comms. A well-structured and transparent reward scheme can improve staff engagement and retention as they feel their efforts to 'go the extra mile' are valued. On occasions where service delivery is below expectations, HR expertise is crucial to managers who need to deal with situations in order to minimise damage to the client relationship whilst also supporting the



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individuals in question.

Finance teams have the ability to add value to a clients' experience with a firm by billing in a timely manner, promptly responding to queries (from internal and external sources) and by acting with diplomacy and sensitivity when dealing with overdue payments. They can also work with client teams to look at key clients' financial performance over time and raise 'red flags' which might indicate a client could be considering winding up its interactions with a firm. Finance teams can also help partners keep track of budgets so that early conversations can take place if the project scope is expanding and conversations need to be had about additional resource and the associated costs.

Although more of a community rather than a department within a firm, PAs and secretaries can add huge value to how a client experiences and perceives the firm. I have seen a number of PAs who are passionate and dedicated to delivering not only an excellent service to their partners but also to their partner's clients.

Some PAs play a core role in the delivery of client projects and are active 'gate openers' (rather than gate keepers) demonstrated by their willingness to get stuck in to project delivery (when appropriate), to help resolve issues and to play a role in firm/client relationship building. These PAs provide invaluable allies for marketers as some PAs wish to transition into marketing roles so are willing to help with marketing projects and when marketing vacancies arise it can be hugely beneficial to internally recruit someone who is committed to your client service vision.

In order for a strong client service ethos to be embedded across a firm successfully, clients need to feel valued and well-treated in every interaction, wherever that may be. Facilities management teams need to make sure that the reception a client receives is to a consistently high standard across all offices and touchpoints. It should go without saying that reception teams should be friendly and welcoming and reception areas clean and comfortable but is that always the case? It might be worth doing some 'mystery shopping' to ensure the standards you strive to achieve are upheld. Aside from your physical reception areas, what about your switchboard? Do you have an efficient and effective system for transferring callers to their desired destination quickly? Do your reception team also act as your switchboard? Are visitors left queueing at the reception desk whilst your team field telephone calls? These are all areas which have such a huge impact on client service but might be lower down the priority list for often stretched facilities teams who are dealing with the latest office move or parking dispute.

In order for a client service strategy to be successfully adopted and embedded within a firm, all teams within the business must feel they playing their part. Everyone should feel engaged and empowered to do their bit in order for clients to feel that they are valued. This should lead to improved client loyalty, retention and advocacy which, in turn, has a positive impact on everyone back in the firm.



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