

No Second Chance

The Importance of First
Impressions to Law Firms



Andrew Barnes
President, ALPMA

In a fast changing environment of rising client expectations and digital challenges, ALPMA helps our members meet the future with confidence by providing practical information, quality analysis and fresh perspectives on the business of law.

We were therefore delighted to collaborate on this report, officially launched at the 2015 ALPMA Summit, which deals with a critical yet often under-rated issue: what clients think of the service law firms provide, and whether they would select us on the basis of their experience.

CXINLAW are a new entrant to the Australasia professional services community. They were pioneers of establishing Client Experience assessment and providing perspective to law firms in the UK. They have brought that experience and a new perspective to our shores and the results are in – whether we are ready for them or not.

I am sure you will find the report both fascinating and challenging but, importantly, I hope there is something your firm can learn from it.



Peter Carew
Director and Family Law Specialist
Carew Counsel Solicitors

We are practicing in an extremely competitive market, made more difficult by the change in the way clients are coming to engage us.

When I met Carl White of CXINLAW, I knew I had to ask for his assistance. The “mystery shopper” analysis provided by CXINLAW enabled us to identify our weaknesses in customer experience and, having done so, CXINLAW developed a program for us to improve that experience.

What I learnt was that clients’ “experience” can be “make” or “break” for the clients. Working with CXINLAW will give you an outsider’s view of how approachable and professional your firm is. If it’s not up to scratch you have a way forward, not by spending more on marketing, but rather by improving the client experience at the very beginning. I have no hesitation in recommending CXINLAW to you in your pursuit of excellence.



Carl White
CXINLAW Director and Lead Author

“This is about living up to our own bull****, isn’t it!”

I soon realised when I arrived from the UK that Australians can get straight to the point! This Australian Managing Partner’s comment is a good example. Many talk about the quality of legal work or client service, but it’s really all about living up to the promise of being a truly client-focused firm at every moment.

Are you being successful at this? It’s not your opinion, but that of the client that really matters.

CXINLAW helps firms see the world as clients do and learn from that critical perspective. What’s clear from our study is that Client Experience Excellence is a key differentiator, and it starts with the first impression. Get that wrong and you’ll leave a client thinking, ‘what else can’t they get right?’

Now, imagine you were a client...

The New Frontier for Law Firms

Today, client satisfaction and dissatisfaction can be broadcast at a speed that no firm's marketing department, however good, can match. TripAdvisor for law is already here and, for many firms, that could prove fatal. In highly regulated markets, notably financial services, the regulators are demanding evidence on issues such as the culture of Treating Customers Fairly, and on the ongoing measurement of conduct risk. It is difficult to see this trend not moving rapidly into law.

The good news is that law firms can learn from the best and use Client Experience Excellence for real advantage.

Since the launch of our ground-breaking 2012 CXINLAW report we have been proud to partner with leading national and international law firms to transform the experience of their clients in dealing with them. In 2014 CXINLAW became part of CXE City, bringing together market leading expertise and insight from law, accounting, financial and consumer services.

CXINLAW's primary objective is to help firms become truly client-focused in a rapidly shifting service environment.

We help clients to:

- 1 Gain unique insights into what clients value most
- 2 Understand the key business drivers of Client Experience Excellence
- 3 Develop strategies to deliver outstanding service across the firm
- 4 Create and develop effective and engaged teams
- 5 Embed and support a sustainable service culture

The document in your possession is the first in a series of timely CXINLAW papers to be released in the Australian legal sector. Our view is informed by three years of client data derived from specialist client experience work. This paper looks at the impact your day-to-day service performance can have on client behaviour and engagement.

We hope you like what you see.

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Section 1: Client Experience Landscape

Client experience is where quality as perceived by the client is created

Client Experience Excellence is a defining advantage for law firms today

Client Experience Excellence. Who cares?

Apple, Virgin, Uber – they transformed entire industries by blowing apart old ways of doing things and delivering new customer experiences. And currently the world's banks are on the back foot worrying about the Apple Pay application. Apple's killer success secret is, simply, that before starting development on any product or service, it asks one key question: "How do we want the customer to feel?"

So what's that got to do with law? Everything.

Expert professional services firms have always thought they were very different from "normal" industries, like music, travel, retail and consumer technology. They have believed "the one important thing" was the quality of advice – all else was secondary. This has led to a culture where the law firm knew best – and customers did as they were told.

If that was ever true, it is not true now. The client experience of you and your firm, the impact you create, is definitive in their eyes. "Inside Out" thinking is being replaced, in enlightened firms, by a more "Outside In" perspective - with good reason.

The average client is so far ahead of the legal industry, it's scary.

Nowadays, clients know what high quality information is available fast and free. They know what great customer experience looks like when they see it. They like it, they want more of it, and they are getting increasingly intolerant of professional services firms that do not provide it - law firms included.

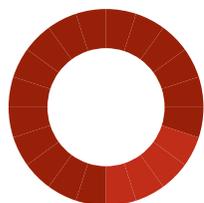
In a recent report, Best Global Brands goes as far as to say we're now living in a new service era, "The Age of You". That means a laser focus on all the little things that define service excellence become absolutely the "Heart of the Matter".

“ Nirvana's Kurt Cobain exclaimed, "I don't care how you feel, as long as it's about me". The world's most successful companies are placing an increasing value on understanding customer sentiment and client expectations ”

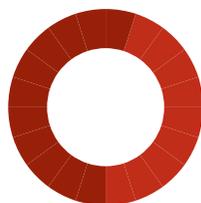
The Law Society of NSW Law Journal, 'Client Experience: New Frontier for Law Firms', Carl White, CXINLAW, Sept 2015

Market Context for Client Experience Excellence

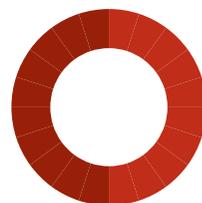
LexisNexis Bellwether 2015 Report says 9 in 10 lawyers believe they are operating in a period of unprecedented change.



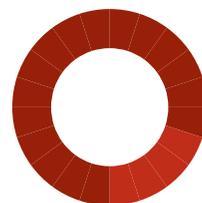
More demanding and value-conscious clients



6 in 10 lawyers view retaining clients as more challenging today



Increase in regulatory risk and compliance



Changes to law and keeping on top of working practices

“The Australian legal market bears all the hallmarks of a mature industry: declining demand, increased price-based competition, worktype decomposition, entry of market disruptors, technology substitution, and growth in both consolidators and niche players”

Joel Barolsky, lead author, 2015 Peer Monitor report, Thomson Reuters and Melbourne Law School

Law firms benefit from consistently delivering Client Experience Excellence.

CXINLAW research typically shows that companies investing 10% or more of their revenue in Client Experience, as opposed to those who invested only 2%, gained in the following ways.



35%

Increase in retained clients



50%

Increase in client referral rates



25%

Increase in fees billed



33%

Increase in higher profits

Source: CXINLAW

Purchasers' View of Client Experience in Law

Legal market research highlights that the pressure on law firms is continuing to increase and new client expectations are an important factor.



“ The issue is not that lawyers are failing to provide adequate service but that they have a higher regard than clients for the service being delivered ”

The Age of the Client, 2015 LexisNexis Bellwether Report

2015 LexisNexis Bellwether. Report 2012 CXINLAW UK Report.



Client sentiments toward legal service providers - CXINLAW client focus groups.

Section 2:

*The First Impressions Impact - it's
Make or Break*

First Impressions Matter to Law Firms

CXINLAW measures and develops the client experience at every point of what we call the 'client journey'. Our aim is to ensure law firms create loyal client relationships, brand recognition and sustainable profits. Of all stages in client interactions, it's their first impression that can make or break the potential relationship with a firm.

If law firms can't get their first impressions upon a client right, what else can they get wrong?

The objective of every law firm is to attract, retain and grow client business and most providers acknowledge the importance of client care in this. However many lack the know-how or capabilities required to meet the new levels of service that clients demand. In addition, a worrying number of firms do not appear to understand the client's service expectations at all. This is especially the case at 'point-of-sale'.

A positive experience can secure more instructions and improve the quality and value of client relationships once engaged. We have seen just how much law firms score 'own-goals' in this respect, and the detrimental commercial impact associated with poor delivery.

Benchmarking Client Experience Excellence

In 2012 CXINLAW launched research into the customer's experience of contacting law firms with an enquiry. In doing so, we brought Client Experience perspectives and analysis, such as retail mystery shopping, into law for the first time. CXINLAW highlighted major issues facing legal providers and our research firmly positioned Client Experience Excellence as a commercial driver in the UK legal sector.

A key highlight from our benchmarking and work with law firm first impressions relates to understanding the following: 'quality' is not solely equated with technical expertise, giving the right answer, and being efficient. These things are important – necessary, but not sufficient. Quality is also judged by the nature and ease of the experience, as well as the utility of advice given. **Quality judgements are formed right from the very first impression made on the client.**

“ People will forget what you said. People will forget what you did. But people will never forget how you made them feel ”

Maya Angelou, acclaimed American author

100

UK law firm enquiries assessed

36%

Gain an instruction

19%

More or less likely to instruct

45%

Not at all likely to instruct

How will Australian Law Firms Perform?

In replicating our UK 2012 benchmarking study here in Australia in 2015, CXINLAW focused on the efficacy of law firm first impressions and used mystery shopping as the primary assessment technique. A sample of 45 small to mid-market firms were contacted by our team, who posed as prospective clients with real legal enquiries.

These included Wills and Power of Attorney, Family Matters and Commercial issues. Enquiries were made by telephone, online and often on the basis of a recommendation. In making contact with law firms the team spoke directly to legal advisers and supporting members of staff, just as typical clients would.

As with the UK research we sought to ascertain:

- How likely prospective clients might be to make an instruction based on their first impression of law firms
- What factors differentiate using Client Experience Excellence - a critical measure
- Practical recommendations for service improvement, client conversion and law firm client-centricity

This paper presents an overview of the results of what has been the first study of its kind in the Australasian legal market.

63

Point Client Experience diagnostic

95

Hours contact and analysis

10

Client purchase expectations

4

Drivers of service excellence

Section 3:

2015 First Impressions Report The Key Findings

You are about to make a legal enquiry. Would you engage and recommend the firm?

Promoters are highly likely to instruct the firm and tell others about their positive experience.

Passive clients are satisfied but unenthusiastic and as likely to instruct your firm as any other.

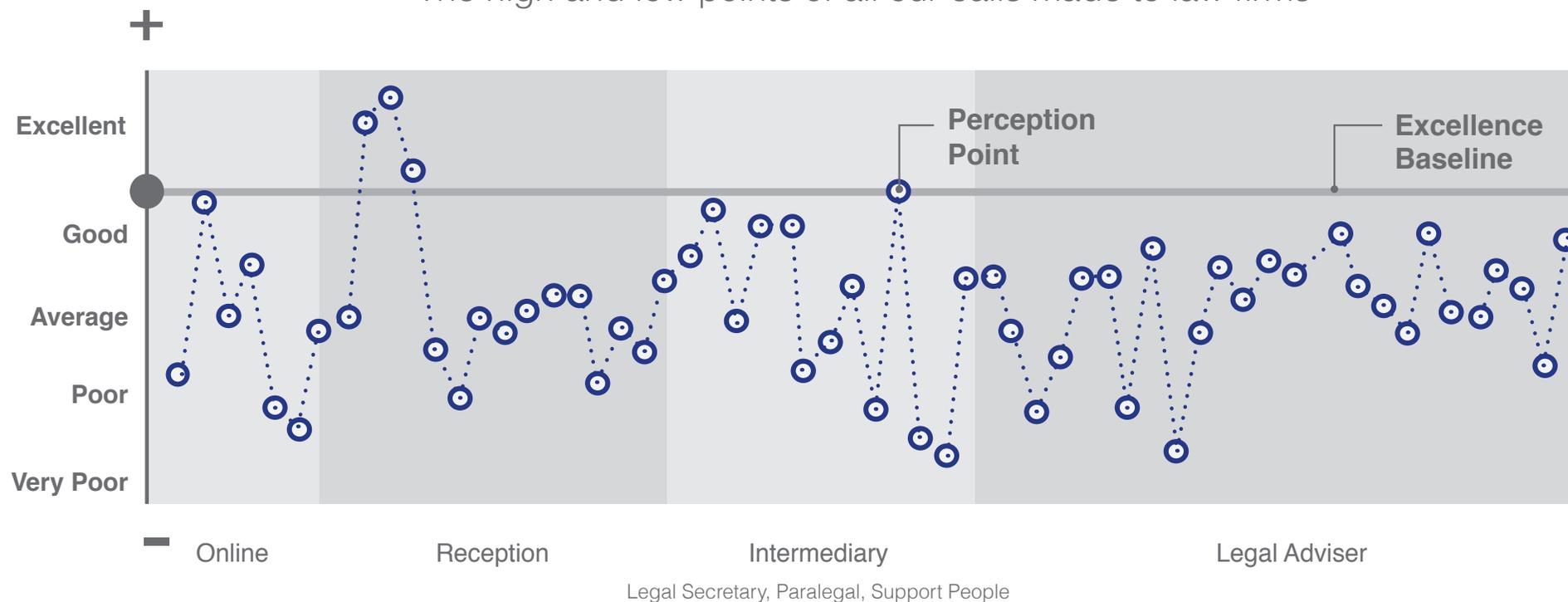
Detractors are unhappy clients that would not instruct and may tell others not to as well.

Key Findings: Would you Engage and Recommend the Firm?



Tracking the Results of Enquiry Contact

The high and low points of all our calls made to law firms



Perception Points are defined and measurable service moments and include what the client hears, sees and feels during interactions, from being kept on hold, to the lawyer's tone of voice.



Assembling Perception Points as shown creates a diagnostic tool which CXINLAW call the **CXE Index**. It is used to design, monitor and increase levels of Client Experience.

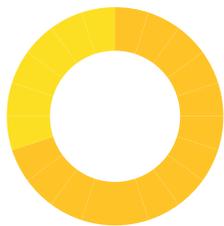


This line denotes the point at which service features deliver a noticeable and meaningful difference to client engagement and conversion. The results reveal an opportunity to improve client conversion.

Key Client Experience hotspots overleaf

Key Client Experience Hotspots

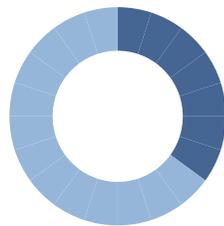
Online enquiry



72%

Websites positioned an online enquiry form in a visible and easily found location

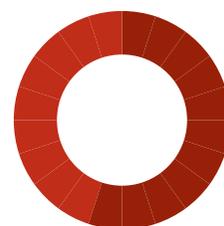
Website use



31%

Website visits were rated as dissatisfying with poor content, resources and visual presentation

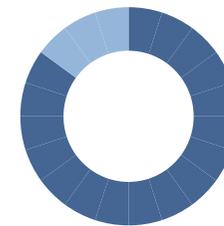
Enquiry response



55%

Completed online enquiries received no communication from the law firms concerned

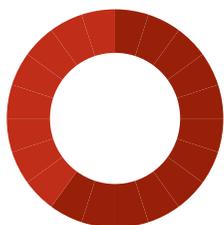
Email contact



87%

Email contact described as reasonably helpful or satisfactory and may not have led to a reply

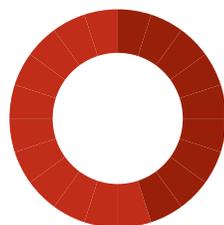
Call answering



60%

Calls were not answered promptly within 3 rings

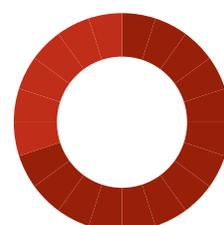
Greeting



46%

Call greeting and direction lacking warmth, friendliness and professionalism

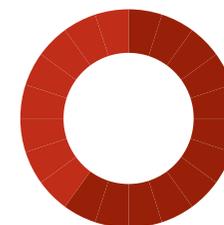
Call hosting



71%

Enquiries left the caller unsure of who or where they were being put through to in the firm

Availability

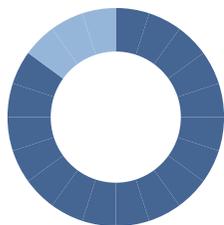


58%

Enquiries did reach a legal adviser on the first call and 17% of contact took 3 or more attempts

Key Client Experience Hotspots

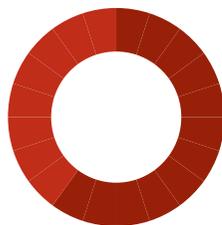
Professional introduction



86%

Introductions on connection viewed as poor with 52% of lawyers not asking for the caller's name and 84% failing to state their role or practice area

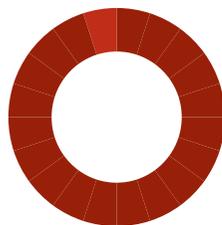
Tone and demeanour



60%

Contact gave the impression of the lawyers' undivided attention from the outset and in 40% of cases a tone of inconvenience was conveyed

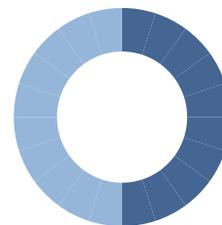
Leading a call



94%

Legal advisers failed to outline what the caller could expect as a result of the conversation

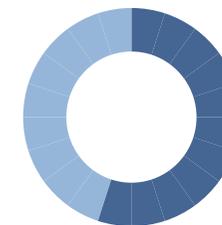
Relationship building



50%

Relationship building / 50% Lawyers immediately focused on legal fact-finding without first establishing rapport

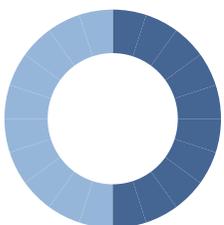
Communicating value



60%

Lawyers failed to effectively communicate the full value and advantages of working with the firm

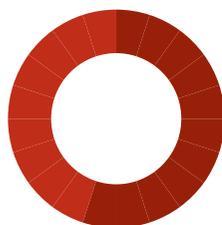
Clarity



50%

Lawyers did not communicate process and fees in a clear and understandable way

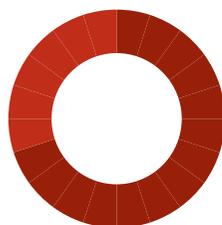
Effective review



61%

Contact did not provide the opportunity to review the conversation and answer outstanding questions from the caller

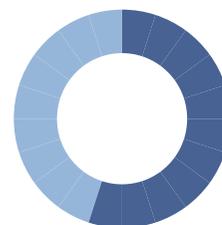
Proactive service



71%

Contact did not result in a follow-up strategy thereby placing all responsibility for progressing the enquiry with the caller

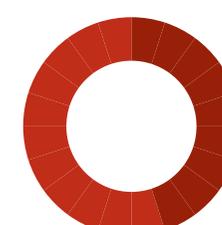
Showing appreciation



63%

Lawyers provided a warm and friendly goodbye but most did not thank callers for their time and interest in the firm

Further assistance

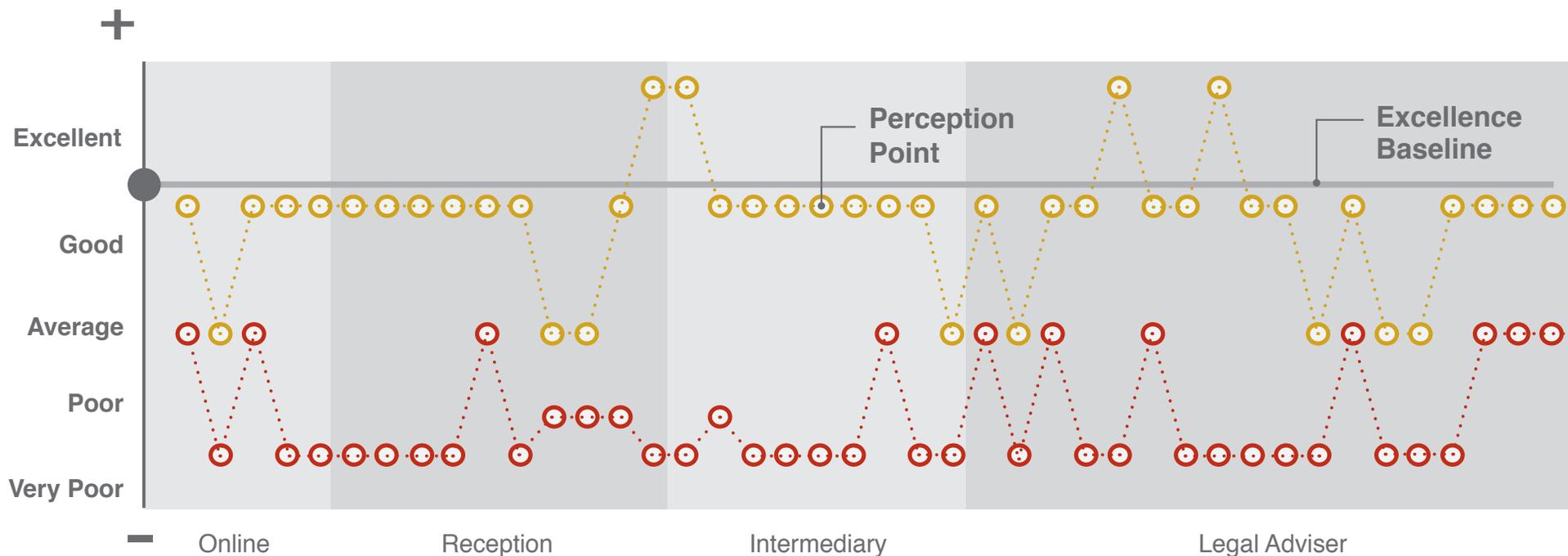


46%

Agreed follow-up contact was not delivered in a timely way or with useful pointers for moving forward

Tracking the Best and Worst Performance Results

Highlighting the improvement required at first contact with law firms (all calls)



Leader

“The adviser was prepared for my call and his introduction was confident, professional and cheerfully delivered. I immediately felt as though I’d come through to the right person and liked him. He was excellent in demonstrating knowledge through his input on my specific needs and also contributed ideas and additional pointers relating to my current requirements. He referred to his experience and due to the consultative approach, this was helpfully evidenced”



Laggard

“I found the telephone exchange with the legal secretary obstructive - being told the fee I could expect before I’d spoken to a legal adviser assumed my decision was based only on price and was quite insulting. Nor was there any understanding that conversing with a solicitor was necessary before I committed time to an appointment. I felt much less inclined to go further, even though I had been keen to talk to the firm”

2015 CXINLAW Research, Shopper comments.

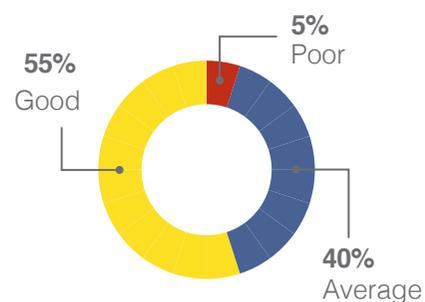
Comparison of Client Experience Impressions

Comparing Private Client and Business Lawyers

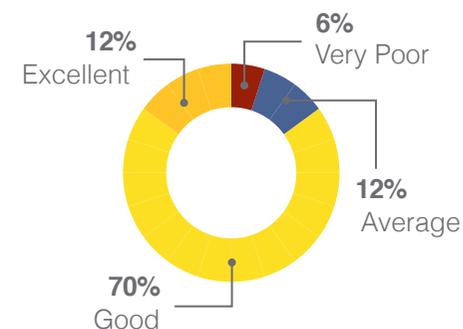
55% of Private Client contact was Good and 45% was rated as Average and Poor. There were no Excellent results or service offered that would have secured an instruction.

12% of Business contact was rated as Excellent and 71% as Good, however 18% was viewed as either Very Poor or Average.

Lawyers in both practice areas could do better.



Private Client

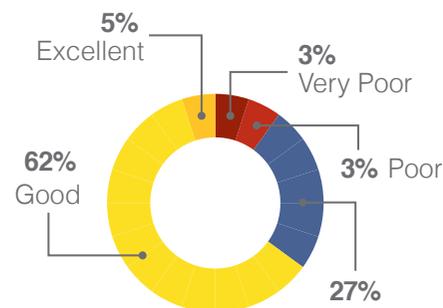


Business Lawyers

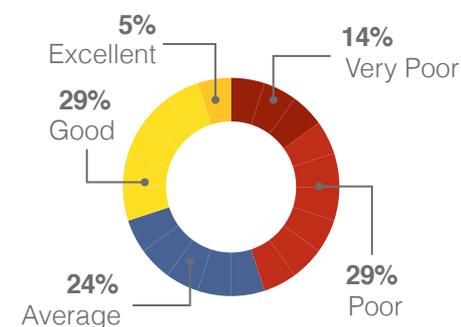
Comparing Legal Advisers with support roles and functions

Only 5% of lawyers were viewed as Excellent and 6% as Poor or Very Poor. A further 27% were Average. Poor to Good results do not secure client instructions. 67% of phone contact with roles supporting lawyers was Very Poor to Average.

All roles, functions and resource can seriously impact enquiry conversion.



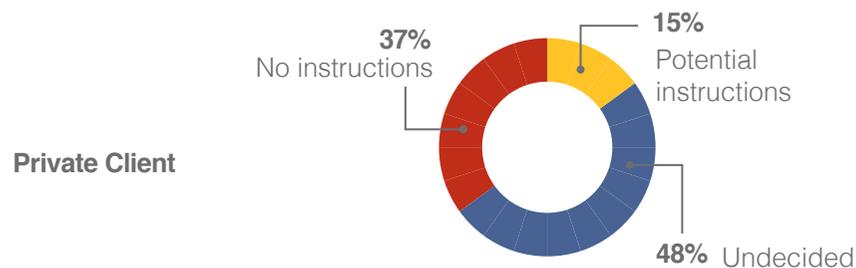
Lawyers



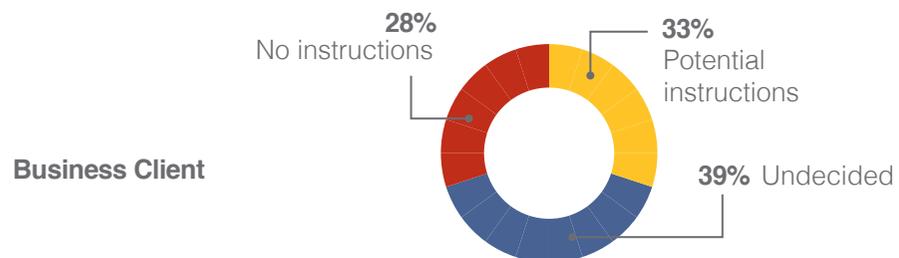
Secretaries and Support

Impact of Client Experience on Law Firm Instructions

Practice area comparison of instructions and recommendations

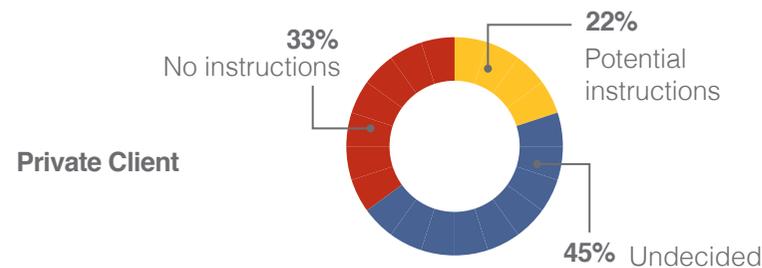


85% of enquiry contact with firms servicing private clients was viewed as Average or Poor in quality with only 15% likely to secure an instruction.



Business enquiries fared better than Private Client enquiries with twice as many likely instructions and 10% less undecideds. However, almost 30% of contact would result in a client looking elsewhere.

Aggregated results for all enquiry types in our sample



78% of initial enquiry contact with law firms did not deliver a very positive result for prospective clients. 45% of firms left shoppers as likely to call competitors and a third of all calls were so poor that an instruction would definitely not take place.

Impact of Client Experience on enquiry conversion

Enquiry value	22% Converted	45% Undecided	33% Lost
\$5,000	\$16,500	\$33,750	\$24,750
\$10,000	\$33,000	\$67,500	\$49,500
\$15,000	\$49,500	\$101,250	\$74,250

Potential revenue from 15 enquiries.

Section 4:
Bringing it all together
The Key Drivers of Success

Observations for Law Firm First Impressions

It's a cliché and sounds obvious but first impressions really count. In the same way, you could presume that much of the service information here looks simple and easy to deliver to clients. You're wrong. CXINLAW mystery shopping indicates that 78% of our sample failed to consistently offer basic and expected levels of customer service. Firms also appear to undervalue the potential of achieving 'sales through service' - surprisingly, **just getting the basics right differentiates your firm from others and wins clients.**

Many small things let firms down in big ways such as receiving no replies to online enquiries; failing to answer the telephone promptly; lack of a friendly greeting; slow call transfers; inability to connect with an adviser; no follow-up or generic and impersonal emails. The importance of all client-facing roles as 'Directors of First Impressions' was highlighted, as was the need for lawyers to understand the same. How we are dealt with by those who are not lawyers is as integral to the experience as the lawyer's manner and helpfulness.

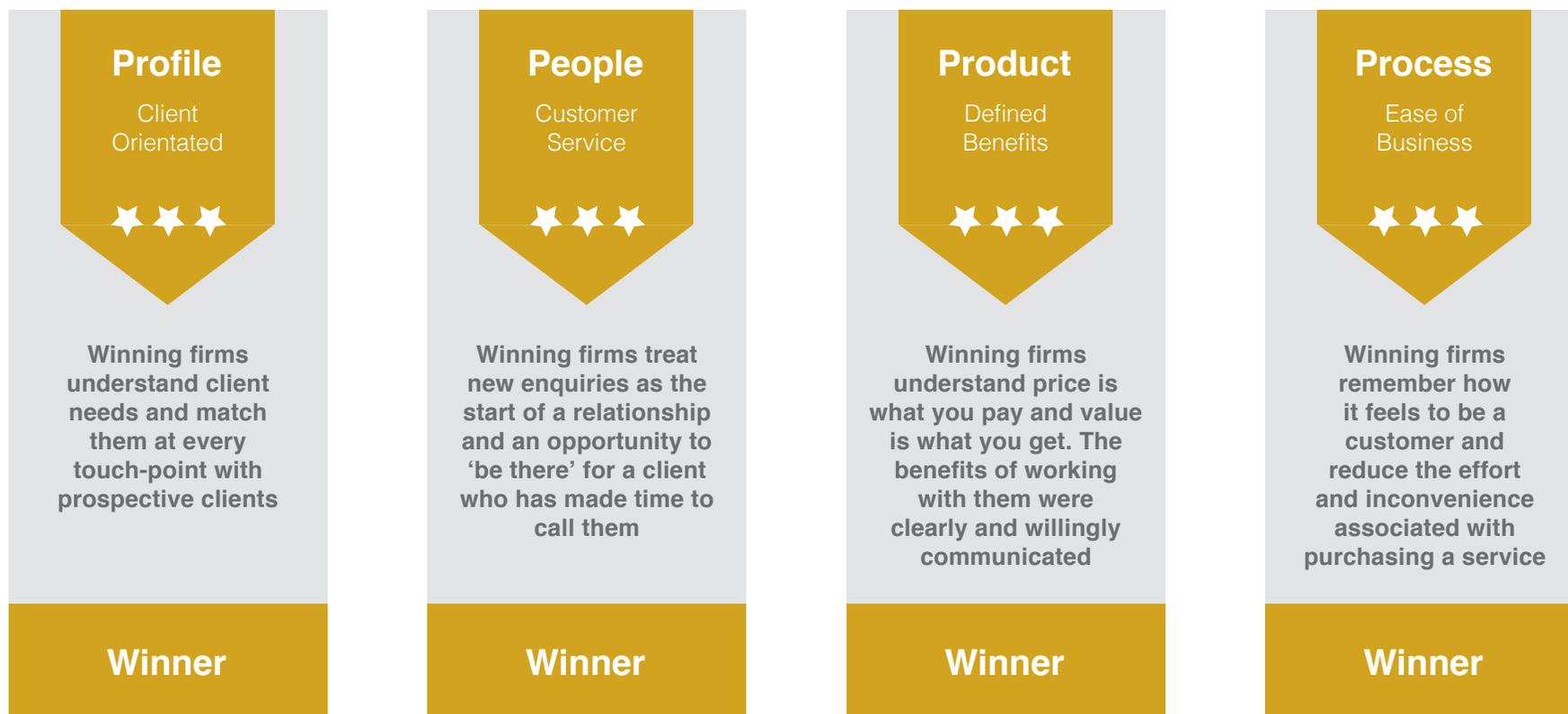
In considering how to maximise a client conversation, the worst lawyers could appear dismissive, dispassionate and dull. The opposite was true of the best advisers who were enthusiastic, respectful and took care to listen. These lawyers understood the relationship function of a call. They also went the extra mile to progress enquiries by agreeing further support. **These advisers gain instructions simply by offering good service. Any lawyer can offer advice.**

Service attributes important to our shoppers' assessment



Drivers of Client Experience Excellence

Firms that stood out from the rest for our shoppers displayed the hallmarks of truly client-focused organisations. These firms had what it takes to impress and win clients.



Section 5: Going Further

*Developing your Strategy for Client
Experience Excellence*

A Firmwide Approach to Client Experience Excellence

First Impressions – then what?

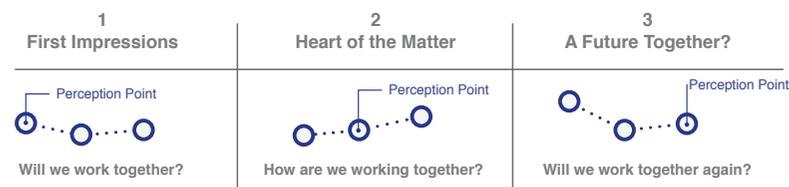
In this report we have shown the importance of First Impressions for firms. We can see that many firms now need to make some real investment in improving that stage of the Client Experience. But what about all the other touch-points and impressions on other parts of the client journey with a firm wishing to become truly client-centric?

Gaining maturity – living it, breathing it. It's a marathon, not a sprint.

CXINLAW has experience and data sets covering all stages of the client journey – from first contact to completion of a legal matter and ongoing client relationships.

These, together with our experience of working with numerous partners, directors, and senior management team members has created hundreds of perception point measures.

Stages of the client journey



The data enables us to take the “PULSE” and measure performance of how much Client Experience Excellence is lived and breathed in the boardroom and beyond.

- P** **Proposition** and policy - how Client Experience strategy and standards are developed in the firm
- U** **Understanding** - how Client Experience Excellence is communicated and embedded at all levels in the firm
- L** **Leadership** - developing Client Experience Champions at all levels of leadership within the firm
- S** **Systems** - the systems and processes that support Client Experience Excellence
- E** **Evidence** - creating the information that drives performance and manages risk

In the next section we focus on three big areas of concern - the Killer Strategy Questions. In our view, firms ignore these questions at their peril. Commercial advantage and, perhaps, survival depend on improvement.

Killer Strategy Question 1: Who “Gets It”?

Championing the strategy - Who “Gets It”?

Professional firms are traditionally about excellence in their craft – be it in law, accountancy or professional services. The focus of the law firm is traditionally about legal cases - “What matters is matters” we often hear.

That focus and culture can create real strength in driving excellence in law – it can also reduce focus of the board and managers on other forces which can make or break the firm. The Customer Experience the firm offers is one of them. And that is a matter of culture.

“The word ‘service’ needs to be reinforced at every level and can never just be a marketing strategy; it needs to be in the DNA with everyone in the firm passionate about delivering”

Simon Michaels
Managing Partner, BDO (UK)
Global Risk Advisory and Accounting Firm

67% of firms score poor or very poor on two or more of these indicators*

- Client Experience vision and strategy is clearly defined and articulated
- Effective ownership and leadership from the board
- ‘Champions’ accountable for Client Experience Excellence throughout the firm
- Clarity on behaviours required by all staff, and building capabilities and skills is well-supported

Action Point

Firms need to develop clearly articulated strategies to drive a culture and a “mindset” of high performance in Client Experience. That means a programme of learning and determining “what good looks like”. The board needs to own it and drive a co-ordinated programme to bring it about.

*CXINLAW dataset 2015.

Killer Strategy Question 2: “Outside In” or “Inside Out”?

“Outside In” or “Inside Out” - What’s our key perspective?

Lawyers are generally very clever people and they assimilate new information quickly. But, with reference to Client Experience Excellence, it needs to be the right information about the key things - it needs to be of the right quality.

Because many firms lack expertise in the area of Customer Experience and in bringing the “Voice of the Customer” to the heart of the business, the information provided is often not sufficient to make key decisions upon. The average post matter customer satisfaction “happy sheet” is a typical example, as is keeping up to date with key Customer Experience trends. In many firms, a transformation is required.

“*CXINLAW helped us to understand that we need a balance of external and internal perspectives to arrive at one version of the service truth*”

Managing Partner, UK Law Firm

78% of firms score poor or very poor on two or more of these indicators*

- Timely information and monitoring of client views as a matter progresses
- Real strategic frameworks to manage client information and client sentiment well
- Internal and external perspectives gathered on client service issues and client experience developments

Action Point

Many firms need to take urgent action on reviewing the perspective, balance and quality of the information upon which they make decisions in the Client Experience area. In particular, more “Outside In” information is required, i.e. the point of view of the client.

*CXINLAW dataset 2015.

Killer Strategy Question 3:

Do we understand the New Risks?

In developed, regulated markets around the world, especially financial services, the issue of Conduct Risk and Treating Customers Fairly is becoming central and hardwired into new regulation. And it is being policed. The regulators are demanding evidence that it is done and done well. The consequences for non-performance are very significant.

Specific areas of focus include:

- Increased transparency in all areas – particularly pricing
- Ensuring the board hears the “Voice of the Customer” in every strategic decision it makes
- Ensuring a real audit trail of evidence – including a need for independent verification

This regulatory attention is heading towards law and other professional services. The new Uniform Law in Australia is an example. From our research we consider many law firms could not withstand the new and rapidly approaching level of scrutiny.

82% of firms score poor or very poor on two or more of these indicators*

- Effective assessment and management of conduct risk across existing and new areas
- “Voice of the Customer” perspective visible in board and management decisions
- Expert approach and independent validation of client feedback

Action Point

In this emerging risk landscape law firms need to develop a proactive approach to conduct risk. There is real commercial advantage for firms in not being complacent or caught asleep. The winners will be leaders, not laggards, in embracing these new issues.

*CXINLAW dataset 2015.

Client Excellence Challenge

Are you Ready to Compete?

From the time we developed our 2012 report to now, CXINLAW has rigorously focused on examining the key components that lead to Client Excellence. This paper has raised some of the current pressing issues facing law firms today.

For firms just making a start on their Client Experience journey we're often asked for a quick checklist of the key areas for attention, and so on this page we have highlighted our current view of the **10 keys to Client Experience Excellence in 2015**.

For each of these areas there are up to 100 detailed measures and Perception Points used – so this can only be a very quick snapshot.

But why not test yourself on how you think your law firm fares against our 10 Keys to Client Experience Excellence.

Respond to the questions on the right.

Client Experience Excellence Keys

No • Somewhat • Yes

1	Picture of Perfection	As a firm, have we really defined and shared a view of what excellent Client Experience looks like and why it's so important today?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Perfection Profile	Do we really understand the new Client Experience needs of our different key client groups?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	External requirements	How well do we understand the external pressures bearing on the firm to perform well in this area?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Voice of the Customer	Do we make sure we truly hear the "Voice of the Customer" and build it into all our key decisions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Growth	Is Client Experience Excellence a fundamental part of our firm's growth strategy?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Leadership	Does our leadership own, reflect, and drive Client Experience Excellence?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Align values and allocation of resources	Have we allocated sufficient resource and expertise to handling the Client Experience issues within the firm?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Engaging strategies	Are our people sufficiently educated, supported and capable of delivering the new levels of service excellence?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	Embedded in operations	Are our systems, processes and practices truly client-friendly and continuously improved?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	Best practice management information	Are we sure we are getting the right measurement information of our successes and risks in Client Experience?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Getting Started

Thank you for taking the time to read this Report.

If you have completed our 10 Keys Questionnaire, you will have taken an important step in starting to focus on some of the critical Client Experience issues.

We are aware that we have presented a great deal of information across a number of areas, particularly in the First Impressions stage of the Client Journey. Hopefully, we have demonstrated how achieving Client Experience Excellence across your law firm will allow you to improve performance and achieve competitive advantage.

We have made a major point in this Report about the importance of different perspectives from inside and outside your firm. We would be delighted to bring our experience and perspective to help inform your Client Experience Excellence initiatives.

“ *Be a yardstick of quality. Some people aren't used to an environment where excellence is expected* ”

Steve Jobs, Apple.

Engage with us.

Some of the areas where we can help your development are:

- **Insight and assessment** – helping you to see the world as your clients do
- **Definition of CX Vision and Strategy** – ensuring a consistent firm-wide Client Experience Excellence approach, which supports your brand
- **Design and develop** – creating specific customer journey programmes, which reap rewards and reduce conduct risk
- **Engage and deliver** – create programmes to educate, engage the team, and identify CX Champions
- **Embed and support** – ensuring a “virtuous circle” of feedback, monitoring, and improvement

If you would like to discuss some of the issues raised in this Report further, why don't we meet for an initial discussion?

**For further information, please contact:
enquiries@cxinlaw.com | www.cxinlaw.com**

Appendix

Glossary of Key Terms

Customer vs Client:

A customer is someone who purchases a product or service. A client is a person who engages the professional advice or services of another. The term 'customer' and 'client' is used interchangeably in the report.

Client-centric:

A specific approach to doing business that focuses on the client. Client-centric businesses ensure that the client is at the centre of a business's service philosophy, and operations. These businesses ensure outstanding client service remains the focus of all activities.

Client Experience:

Is the total value proposition provided to a client? It includes their experience of the product, service delivery processes and service mind-set of providers. All of these components add up to form an overall Client Experience.

Front-end client experience:

The initial contact with a firm as a prospective client – this study only focuses on the first call and if necessary, second call, made to firms and providers, including contact with reception, legal secretaries and solicitors or legal adviser.

Net Promoter Score:

"NPS" is a straightforward metric that holds companies accountable for client treatment. NPS is based on the fundamental perspective that potential and existing clients can be divided into three categories: promoters, passives, and detractors. The score is derived by asking one simple question "how likely is it that you would engage and recommend X firm to a friend or colleague?"

Perception points:

Measurable service moments experienced by the client throughout the client interaction. They include what the client hears, sees and feels when communicating with staff.

Secret shopping:

The use of individuals trained to experience and measure any client service process, by acting as a potential client and reporting back on their experiences in a detailed and objective way.

"Inside-out" perspective:

The ability of firms to be able think and feel as prospective clients do.

"Outside-in" perspective:

Thoughts and feelings of prospective clients about a law firm and the service it provides.

Client Journey:

The entire encounter a client has, from the very first impression of a prospective firm, to dealing with them, closing a matter, and potentially working with them again or recommending the firm to friends and/or family.



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Design and Production

Tom Goode
Will Saunders - Studio Raygun Ltd.

And our “secret shopper” team!



CXINLAW is a trading style of CXE City (Australasia) Pty Limited (registered in Australia under business number 45606015605).