

# Client Feedback: Considerations for Client/Referral Source Selection Process

By [Silvia L. Coulter](#) on September 24, 2020

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Below are suggestions for consideration when choosing clients to include in your firm's client feedback program. When considering these criteria, it is also useful to examine clients/referral sources over a five-year look-back period to uncover any additional trends.

Selection criteria to consider:

- 1. Succession planning.** Building strong client relationships takes time. For partners who are retiring within the next five years, we recommend the firm begin to introduce a new relationship partner or team to the client. Building on input received from the client, the potential new team or succeeding relationship partner will have an opportunity to use the feedback and data from the interview as a foundation from which to continue to build a strong relationship between the client and the firm. Clients want to be involved in these decisions.
- 2. Threatened client relationships:** These relationships have several identifying factors which include:
  - A decline in fees received over a two or more-year(s) timeframe
  - Significant clients who are most likely the target for other law firms, therefore creating a competitive threat to the relationship
  - Clients where a less than favorable outcome from a deal, a case, or a matter causes uncertainty for the firm about its future relationship with the client
  - Little integration with the firm overall—one client contact and/or one firm contact. Research shows that the strongest firm/client relationships exist where there is integration across three or more practice areas
  - Retiring responsible partner or retiring client contact (related to 1 above)
- 3. Significant clients:** Firms are built on strong client relationships. While we recommend that relationship partners and members of the firm's management team visit these clients annually, it simply does not always happen. And yet, these clients' views about what they value, about the relationship they have with the firm and its contact partners and lawyers, and about their perceptions on how the relationship may be made even stronger are critical to the continued care and growth of valued clients. Leveraging these strong relationships into loyal advocates requires not only the firm's focus, but also inclusion of the voice of the client in the process.
- 4. Clients with potential for growth:** Some clients are very specific about the firms with whom they work for particular situations including type of legal services needed, jurisdiction, and existing strong and loyal relationships. Not all clients have potential for growth. Understanding the client's philosophy and perceptions in an objective manner can uncover the potential for the relationship to grow. Studies have shown that many clients are just 'somewhat satisfied' with their outside counsel and they have not switched firms because it's easier to stay with the status quo. Building strong relationships, starting with a client interview process, can identify potential opportunities for client growth and therefore increased share of wallet, and ultimately more loyalty to the relationship from the client.

5. **Clients in potential growth markets–Building on existing strengths with smaller clients:** Many firms have a client list focused on certain market segments. To build the firm’s success in these industries and segments, there will be opportunities to concentrate on and grow those (sometimes smaller) clients who have already worked with the firm. This provides the firm an opportunity to expand its presence to potentially become a “go to” firm in specific industry market segments.

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**About the Author:** Silvia Coulter is a Co-founding Principal of LawVision Group. Silvia Coulter is widely regarded as one of the legal industry’s most experienced business development and leadership consultants. Her experience includes working as a former strategic account executive and sales leader at a Fortune 50 company, a chief marketing and business development officer at two global law firms, and consultant and facilitator to professional services firms across the globe. She was an Adjunct Professor at George Washington University’s College of Professional Studies in the Master’s in Law Firm Management program (2010-2019), a co-founder of the Legal Sales and Service Organization ([www.legalsales.org](http://www.legalsales.org)), a Past Elected President of the Legal Marketing Association and an elected Fellow of the College of Law Practice Management. She is a frequent speaker and facilitator at professional service firm retreats and legal industry meetings. Silvia is the co-author of three books: *The Woman Lawyer’s Rainmaking Game*, *Rainmaking Advantage*, (due out Summer 2020) and *SAM-Legal: From Key Clients to Strategic Accounts* (due out Summer 2020). For more information please contact Silvia L. Coulter at [scoulter@lawvisiongroup.com](mailto:scoulter@lawvisiongroup.com) or 617-697-4869.