

The Evolution of the Law Firm Client Team

By [LawVision](#) on March 1, 2021

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Remember when “client team” referred to just the attorney’s billing to a particular client? With flat demand for legal services now and for the foreseeable future, law firms are in a race to increase market share with their existing clients. The most innovative firms have stepped up their game. They have sophisticated teams that utilize professional staff to goose client service, identify cross-serving opportunities, and transform the relationship into a true business partnership — all while making the relationship partner look good in the process.

Law firms are bringing professional staff who can give a holistic picture of the client. Here are some of the functional areas and how they are being addressed.

Financial/profitability information: One marketing executive told me the best thing she did for her client teams was to bring in the pricing and billing experts. This activity is especially important for clients with whom the firm has multiple engagements and complicated billing structures. A pricing expert, typically from the finance department, should let the team know which types of client work are most profitable. Firms may be locked into rates through an RFP or competitive process in certain areas but free to pursue other practice areas at competitive rates. In addition, a billing coordinator can surface issues before they become a problem with the client. Too often, a billing issue ends up unnecessarily harming a relationship and is not addressed before it is too late. It is especially important to know about any billing issues before going into a client interview situation. Involving the finance teams helps to head off potentially damaging incidents proactively.

Administrative support: Have regularly scheduled meetings and take notes — while this may seem routine, making the “trains run on time” is harder than it looks, and many firms fall down on the basics of having a regular schedule, agenda, and follow-up items for their client teams. The relationship partner can be helpful here, particularly in setting the agenda, but others can be brought in on the scheduling and follow-up. An executive assistant that supports the relationship partner is a natural to set the schedule for the group. She/he typically has access to everyone’s calendar on the team and can start with the relationship partner on setting a regular schedule. Most teams meet monthly. If it is an especially large team, the core team can meet monthly while the larger one gets together quarterly. When launching a new team effort, the marketing department often takes the lead. Still, once it is up-and-running, the marketing professionals can perform more high-value functions as outlined below.

CLE/social: An important way to partner with clients is to make sure the firm is working with the client on CLE presentations. A client account manager or ambitious associate can play the role of liaison with the in-house team. These presentations can also be an important source of information for what topics the client is most interested in. The associate can work with marketing to tee up potential topics. Of course, it is important to stay on top of deadlines in the states where the client has most of its employees. In normal times, some frequent social event, whether it is a wine tasting or baseball game, is a great way to build strong personal relationships between the in-house team and the client. An associate can play a crucial role here, too, as she/he will likely know the personalities better and offer suggestions for events that will appeal to the in-house legal team. This role is an excellent way to sow the seeds for the next generation of lawyers who will eventually take over the client relationship.

Knowledge management: This is a crucial aspect of the team. It can differentiate whether the firm's actions are reactive or whether the firm can move up the value chain to provide actual business advice that helps their client be more strategic. In other words, to be a trusted advisor as opposed to a reactive service provider. Most firms have a library or research function, which is a good starting point for unearthing business and legal articles on the client. However, simply sending a list to the team will not be fruitful unless someone is tasked with curating and leading discussions of those topics with the group. Marketing can play a key role here. A marketing professional should understand the client well enough to connect the dots between legal and business issues. Associates can also play an important role, especially in interpreting whether the legal issue is pertinent or to make sense of language in a 10K. Litigation reports provide significant information on where the client is being sued, what type of cases, and who represents the client in those cases. This information allows the team to have a rough idea of its market share and provides fodder for discussion with the client about their use of outside counsel for particular cases.

Diversity/Inclusion: Already an important consideration, it has become increasingly imperative for law firms to consider diversity on their teams. Many clients are demanding it and requiring detailed reporting to ensure that what they were promised in the pitch meeting is playing out in the actual work. Many large AmLaw firms now have a Chief Diversity Officer or similar role to ensure there is a voice for D&I at the firm's highest levels. For prospective clients, the marketing team should be assisting the lead attorney with identifying a diverse team. Once the prospect is a client, marketing, and the diversity officer work together to tee up other diverse attorneys to introduce into the team. Some firms are investing in their diverse attorneys in terms of additional business development and leadership training to give these attorneys a leg up when opportunities arise. They are setting their diverse attorneys up for success with their clients.

As firms continue to get more sophisticated, the emphasis will be to do even more to bring the client voice back to the team. Only 41% of firms in a recent survey had an established client feedback program. Listening to the clients, understanding their objectives is one of the most critical aspects of client retention and growth. As my colleague Silvia Coulter wrote [recently](#), we are also seeing firms set up their own client advisory boards. This is another important tool for providing real-time feedback on those issues top-of-mind with the client. As firms become more sophisticated with connecting the many data streams within their organizations, client dashboards will become commonplace, including warning signals that alert management if a client relationship is in trouble, or conversely, where there is opportunity for growth. Firms focusing on client listening and aligning with what they hear from the client will reap the rewards.