



Client Relationship Management – clearing the fog.

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Entering into a client relationship initiative is a bit like getting on the treadmill on January 2nd and throwing out the unconsumed brandy sauce and chocolate log. It starts out really well, doesn't it? Intention is at its peak: intellectual and emotional consent abound and the targets are clear. You know you're going to feel better and people will be attracted to you more. Some of you would have been warned that your long-term survival depends on it. You'll be a great role model for future generations that will want to know, "just how did you do it?"

You slog away constantly at first. Then a bad, tired or bored moment dampens your renewed outlook and it fades away quicker than you can say: This is too much like hard work, life wasn't so bad before, was it, and anyway I'm too busy. I know what I'm doing: to hell with those health/psycho babble/touchy feely/skinny/rainmaker freaks. I'm comfortable just where I am.

As with the health regime, CRM staying power is only seen in anecdotal exceptions. Reasons are many and varied but what is emerging is a set of assumptions that make CRM as an active initiative less applicable and accessible to all. So, before you reach for the jam doughnuts, lets dispel some of the many growing number of myths:

- CRM is the preserve of the magic circle and similar heavy weight firms: Nonsense. CRM is about establishing a personal and firm-wide mindset to delight your client. Great people persons are all around us. I've met a few great partners at larger firms from my time as a buyer of services but proportionally many more from smaller firms. They may not trade on a 100gsm letterhead but their size allows change to occur quickly and efficiently, with time for real buy in from their lawyers who can contribute openly.
- CRM is only for rainmakers: listen around carefully and you'll note that "rainmaker" is a term used in decades long gone. Sure, a few exist but they don't hold the monopoly on maintaining, developing and attracting clients. Commercially and legally astute buyers want an all-round service and a raft of value-adds: all decent lawyers should be part of delivering that.
- You have to invest a seven-figure sum in an IT system to make it work: Any tools to assist its management (be they business development assistance, IT support, marketing blurbs etc, etc) are just that – tools. An internal system, which logs all relevant client information

and developments, is not a rocket science application but win the hearts and minds first. I've seen firms install premium-rate hardware as the prequel and the training of it as the introduction to CRM but it adds to the "yet another chore" perception.

- CRM is yet another chore: As one equity partner I've advised stated, "from where am I going to find the time and energy to undertake this onerous task?" Consider your career options if it's onerous to be interested in your client's industry, business and personal needs. CRM is not a lunch appointment: it's a state of mind and should form part of the basic service you give your client.
- CRM is what the marketing/business development department is for. Sorry, but you can't outsource super-pleasing your client and responding to their needs whilst you mark-up a contract. A decent marketing support can assist on information management/dissemination and even strategies or tactics for client maintenance and growth but you're now a business adviser instead of a "pure" lawyer. It may not be what they taught you at law school and yes clients are asking a lot from lawyers these days; but just remind yourself of what your hourly rate is and what that ought to mean for the client entrusting their issues in you above every other lawyer in town. Make it worth it for them and they'll be back for more.
- You have to be interested in people: Yes you do – relationships are exclusively about people and forging the strongest client ties is a two way process with the client feeding back and being listened to all the way. In my experience, the "older" equity partner generation resist the need to change their spots being turf defensive but you don't need to be. It should not be out of your comfort zone and even if it is, start by easing yourself in by using CRM techniques that can be employed without even leaving your office.

The starting ingredient is determination to succeed and enough support and even care for all those locked-away insecurities that our delicate psyches need, for the long-term commitment. The courageous are genuinely focussed on increasing instructions, growing cross-referral opportunities and new business development avenues. They might also think of the additional benefits to their pockets and egos. That's okay: we all need rewards and to feel good about ourselves.

The best lawyers are asking clients the right questions and creating the appropriate opportunities for the client to buy and buy again. They provide the best possible legal advice with a framework of all-round support and service to their clients. They dare to get off their seats and enter the client's world. At its strongest, they're working creatively guiding clients to work more efficiently to enjoy the value-add. Without question each lawyer must acknowledge the enormous competitive forces at play from other law firms and service industries advising their clients, who themselves operate in an increasingly sophisticated service environment.

So, a long journey of behavioural and cultural change, requiring enormous support lies ahead. It means a genuine and competitive interest in your clients industry and strategic direction as well as differentiating yourself from the pack and reaping the rewards as an all-rounder. As a managing partner said to me recently, "ignore the over-sensitivities you'll see here, it's just lawyers dealing with change. This is a new culture and it's not going away." Now, where are those trainers?