

Be careful of the 'My Client' mentality and proud of your Team!

By Dave Seager, Consulting Adviser to SIFA Professional



I was asked recently to write an article on the importance of the team within a solicitor practice. In that particular piece, I focused on the opportunity, perhaps inspired by the Transparency to show researching customers at an early stage that they will be dealing with a team and not just the lead solicitor or legal executive for the service required.

I stand by the importance of portraying your firm's team approach on the company website but writing the piece caused me to consider the wider issues on this theme. Most particularly, the potential problem for the firm as a whole of a 'my client' mentality. In my own field of financial services this might be where the client only has a relationship with one adviser, and not the financial planning firm as a whole. Quite often this is a thing in the mind of the adviser and not necessarily the client but with so many areas of financial planning linked, it is undoubtedly relatively easy to introduce and encourage an environment of cross referral between specialists within the practice.

As there are multiple problems associated with the 'my client' mentality it needs to be addressed but this may not be so straight forward in a traditional siloed law firm. To be willing to address the problem, if you accept it exists, then grasping the potential drawbacks is important.

From the solicitor practice's perspective this would focus on two areas; if a solicitor or legal executive leaves the firm, the client will leave with them and also if the firm is seeking investment or even on the market, the value will be enhanced if clients are longstanding and obviously aligned to the firm and not an individual lawyer. From a client's perspective, they might only be ever offered legal advice by the person with whom they have dealt with and might not be introduced to the wider services available through the firm.

The traditional issue for law firms is that new clients tend to arrive with a problem, or a particular issue and firms have not done well at marketing other services and identifying further existing or future needs. As mentioned above this might be simpler in the financial planning arena but since 2019 and the introduction of the 'firm code of conduct', there is certainly a wider recognition of the need to address this frailty in the practice model.

The key is to market your firm as a type of club, with a fabulous first team, at outset. The 'about us' page on your site, aside from the home page, will probably be the most visited, so this section must be

super engaging. This should tie in with how you introduce your team, with images and personalised and friendly biographies, to create that warm, approachable feel.

Client newsletters and questionnaires are also valuable tools to assist you to introduce the one-off customer, or the client who has only engaged with one lawyer, to the wider services that might be appropriate, now or in the future, and the other wonderful team members who might deliver them. Getting your team members to write blogs or sections in the newsletters is an excellent way to introduce them. The questionnaire at the outset or even at the completion of the initial service can identify the other legal needs or potential future services and guide which other team members and services you introduce.

Lastly, it is critical that your customer or client knows every member of the team delivering the service and not just the lead name. We cannot ignore the constant gripe from clients 'I could not get hold of my solicitor' which becomes a non-issue if they are also familiar with the paralegal attached to their matter. Certainly, the pandemic has increased the use of CRM and video meetings have become the new normal and both facilitate more touchpoints with your firm, so ensure those touchpoints widen the client's relationship with your teams.

I cannot ignore the opportunity to finish by recommending that you also consider introducing your firm's relationships with your carefully selected third parties to whom you will refer. Those financial planners and accountants are key members of your wider team and potential clients looking at your website will take comfort in knowing that your law firm recognises that many aspects of legal advice are inextricably linked with financial and tax advice. ■



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