CX in the Hybrid Workplace: Starting a Program or Staying on Track

CX in the Hybrid Workplace: Starting a Program or Staying on Track

*By **@Alice Simons**, Marketing Communications Manager, Hudson Cook, LLP*

In today's competitive legal market, having a robust Client Experience ("CX") program can be an important tool in the client retention and business development toolbox. The hybrid workplace may have thrown a wrench into your plans to either start or continue your CX program, but perhaps today's "new normal" might actually provide additional opportunities to connect with clients and build an even more robust program.

I spoke to several CX pros about starting and sustaining a program in today's work environment. **Liz Lockett**, chief marketing & business development officer at Ice Miller, implemented a successful CX program at her former firm. **Yolanda Cartusciello**, partner at PP&C Consulting, advises law firms on strategic initiatives and organizational management issues. **Paul ("PJ") Sawchuk**, principal at Absolute Advisory, is a business technology, leadership and operations strategist who works with teams of all sizes to help implement CX programs.

Q: How can you start at CX program at your firm?

Liz: It has to start at the top. Your executive team, the board, and your Managing Partner/President must understand the importance of a CX program and the time and resources it takes to implement one successfully, and they must be willing to commit to it for several years. They must be the ones driving the message. It also must be a firm-wide effort, with all lawyers and staff being evaluated on their commitment to CX as part of the comp and review process. After creating the appropriate messaging, you will need a dedicated CX Director or Chief (not the CMO or CBDO!), and a team to support him/her. Figure out what success looks like, how to measure it, the plan to get there and the resources (time and money) to do it.

Yolanda: You must begin by getting yourself in the client's mindset. This is best done by actually speaking with the clients and getting their points of view. If you already have a client interview or client feedback program in place, you can start there. If you don't, compare your list of clients with your alumni list. Often alumni who are also clients are very willing to engage in client feedback conversations because they still have strong ties to the firm and want the firm to do well. Once you've collected enough feedback, bring together a group of lawyers and administrators to brainstorm potential ways in which the firm can address the issues that were raised in the feedback. The most important aspect of this exercise is to ensure that participants are freeing themselves of thinking about the limitations that already exist and are brainstorming about what could be done in an ideal world. Then work backwards as to what would need to change for the law firm to implement the "ideal" experience for the clients.

Q: How do you set program goals?

Liz: Although we ultimately want to bring in more revenue, consider more specific, measurable goals such as relationship strengths (number of new matters in practice groups divided by increase in revenue year-over-year) and client feedback and/or surveys.

Yolanda: Ultimately, the success of a CX program can only be validated by the clients themselves. It's best to set goals that align with the level of positive feedback that you receive from clients on subsequent interview and feedback programs.

Q: What are some KPIs (Key Performance Indicators – see **my KPI program summary article**) to measure?

PJ: First, make sure that the metrics you plan to track sync with your goals. Next, figure out where you can capture or reference the datapoints needed to drive those metrics. Start with existing systems such as time and billing and CRM to see if these systems can handle what you need to track, or whether you may need to evaluate new systems. Some metrics you may want to consider:

- Client satisfaction
- Net promotor
- Retention rate
- Client churn rate (net clients lost or acquired divided by number of clients at start of period)
- Referral rate
- Prospect conversion rate (how many prospects become clients within a designated time period)
- Prospect conversion time from first contact (length of time in journey from entering the sales funnel to becoming client)
- Client effort score (what do they have to do in their journey and how much effort does it take; e.g., produce or sign documents, attend meetings, go to court, etc.)

Yolanda: Positive feedback levels measured by net promoter scores, referrals, and unprompted compliments provide one type of measurement. Another might be to measure the retention rate of clients prior to and after implementation of a CX program.

Q: What might look different about a CX program in a hybrid workplace?

Liz: CX is even more critical in a hybrid workplace. People need connection! Picking up the phone to check on a client or inviting them to participate in a virtual or in-person event will be appreciated. Get to know your clients and be creative. Do something that adds value to their personal or professional life. It is also much easier to speak to clients via video or phone than having to travel. People have more time now – use it to cultivate relationships.

Yolanda: While the pandemic posed many challenges for law firms and our clients alike, one positive outcome was the realization that all work does not need to be done in an office setting. This has led to numerous opportunities for hybrid work solutions to finally take hold. As we continue to explore how we AND our clients evolve towards hybrid work solutions, there will continue to be a larger emphasis and reliance on technology such as virtual meetings, virtual closings, and virtual hearings, as well as online organizational tools (e.g., virtual deal rooms, billing hubs, libraries, and record rooms) to interact with our clients without being in the same room. We had already moved away from primarily in-person interaction with our clients even before the pandemic. Now, the challenge is creating a community within the law firm itself and imparting expectations through virtual means. This will also require additional technological tools to reinforce culture and community. That culture will include client experience training and expectations for client interactions and client service.

Q: What is your best advice for a marketer starting a CX program at his/her firm for the first time?

Liz: I'll reiterate what I said earlier - make sure you have the full support at the top. It is a LONG journey.

Yolanda: Don't try to boil the ocean. When considering a CX program, you may read about whole organization involvement and the great benefits that such a firmwide effort will produce. The reality is that most law firms tend to do better with change when you start small and let change permeate throughout the organization. I advise firms to consider beginning with either one practice area or one aspect of service delivery such as billing and finance. There are usually a few partners who are enthusiastic about trying new initiatives. Start with those partners and communicate the benefits they may gain for their practice by engaging in a CX initiative.

If you are looking for more in-depth information on starting a CX program and on client journey mapping, **join us in Vegas for the full-day pre-conference program, "Going All In on the Client Experience —Using Client Journey Mapping to Deliver a Better Client Experience and Drive Revenues on a Small Budget,**" presented by the Solo/Small Team SIG. The program will be applicable to those overseeing practice groups at larger firms as well. Full disclosure/shameless plug: I am co-chairing this program with **Misty Borg Misterek**, and Yolanda will be facilitating the program. We'll be joined by in-house counsel who will be