

Client Panels: A Retreat Checklist

To get optimum results, panels must be carefully prepared.

By Gerry Riskin

A Client Panel is a potentially powerful tool for getting your attorneys to reflect upon their client service performance and improving it; however, to get optimum results, one has to prepare the panel very carefully. Let's assume a mix of existing and prospective clients comprised of CEO's and General Counsel.

I strongly recommend that the initial comments of each panelist be limited in time - let's say to seven minutes each. The presentations are limited in favor of allowing ample time for questions and answers and open discussions following the presentations - let's say the balance of a session that is 90 minutes in its entirety.

It is essential that your panel moderator conduct a preparatory interview with each panelist a few weeks in advance. This will make a world of difference to the quality and value of the panel presentations.

Here is the checklist:

1. Review the panelist's CV before contacting them and begin by making it clear that you have done so.
2. Communicate the purpose of the briefing which is to be a catalyst to help the panelist formulate thoughts for the seven minute presentation. Remind the panelist that they are free to make whatever points they think appropriate but that this fifteen minute preparatory interview may stimulate the creation of a useful list of bullet points around which the presentation can be built.

3. Ask the panelist a question or two that will assist in making a more meaningful and personal introduction, for example, for General Counsel, "As a lawyer working inside "ABC", from what do you derive the greatest professional satisfaction?" or for a CEO, perhaps "As CEO of "DEF", what do you believe has been your greatest achievement in recent months or years?" The answers to these questions allow an introduction on the day that significantly transcends a mere recital of the CV.
4. Ask the panelist to reflect upon law firms that they have preferred over others, now or in the past, and to articulate what it was about those firms that distinguished them from the firms that were not preferred. Here is where the moderator can make a huge difference. In almost all cases, the panelist's initial response will be abstract and conceptual "I preferred the firms who gave us better service"; or "understood us", or "understood our industry." These are potentially valuable answers but worthless without illustrations and examples.

This is an opportunity to get the panelist thinking in more concrete terms by asking: "Can you give me an example or illustration of specific behavior that demonstrated to you that a firm understood your business?" By digging deeper and deeper for examples and illustrations, you are gently and appropriately enhancing the preparation of the panelist and the utility of their address to your firm. Indicate to the panelist what you have just done and ask that as they create their bullet points to please reference the illustrations or examples that they think will best illuminate each point.

5. The next question is the corollary of the last one: ask the panelist to reflect upon law firms that they have not preferred and perhaps have discontinued relationships with and to articulate what it was about those firms that disappointed them. Examples and illustrations are equally important here.

By ensuring that the presentations and discussions surround specific illustrations and examples, the attorneys will instead realize how the illustrations apply to most of them and will be genuinely concerned, perhaps enough to improve. After all, isn't that the purpose of the exercise?

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