

## How Troutman Pepper Puts Client Service Front And Center

By **Aebra Coe**

*Law360 (May 4, 2022, 1:22 PM EDT)* -- Soon after the merger of its predecessors, Troutman Pepper in 2020 created an office devoted exclusively to client care, led by a chief client care officer with decades of experience in marketing, business development and client experience.

Daniel Pulka says he and the office he leads are "the tip of the spear" when it comes to finding ways for the law firm to discover what it is clients need and what they value, and then delivering.

The group meets with clients to learn more about their needs, works with practice groups to help them deliver value to clients, and consults with clients on various other areas such as evaluating outside counsel and the use of alternative legal service providers.

"My folks really play a role in helping to make sure we're adding value in ways that are meaningful to our clients and connecting them with other resources in the firm," Pulka said.

Pulka talked with Law360 Pulse about what Troutman Pepper's client care office is doing, how it operates, and what it has accomplished in the nearly two years since it was created. This article has been edited for length and clarity.

### **When was the chief client care officer position created there, and what was the firm's reason for creating it?**

My role and the client care office were created in 2020 with the merger of Troutman Sanders and Pepper Hamilton. I think our leadership understood that no matter the size of the law firm, a top determining factor in building and maintaining its success is really the experience the clients have. You'll read a lot in the legal press about how a number of firms are failing to deliver on their promise of excellent service or adding value in their relationships, and potentially losing out on the opportunity to expand engagements and drive revenue.

I'm a big believer that exceptional service, when provided consistently across the firm and client base, can be a real and meaningful differentiator. The role of the client care office and my role as chief client care officer is really to make sure that the firm is delivering on the promise of service and value.

By creating this office we made a real purposeful decision to put client service and client value at the center of our mission.

### **How many employees are in the client care office?**

We are at nine people and growing right now. The folks on my team are divided into a number of functions. We have people who are directors, who are focused on working with attorneys and practice groups on delivering value and experience programs with their clients. And they have a number of folks beneath them who are supporting them.

My team has met with, I think, 162 firm clients in the last 14 months around value and the client experience. My folks really play a role in helping to make sure we're adding value in ways that are meaningful to our clients and connecting them with other resources in the firm. So we tend to be the tip of the spear — that is, helping to identify opportunities to add value, participating in the creation of those activities when it's right for us to do them, but also connecting them with other folks. So we work a lot with our chief innovation officer Will Gaus and his team, who are focused on helping us elevate and build tech solutions for clients. We work with our pricing team a lot on building and creating solutions to help drive clarity around cost and budget. Our [diversity, equity and inclusion] and pro bono teams are doing a lot to partner with clients as well.

In addition to groups of people who are focused on clients, and working with practice groups on client value programs, I also have a couple of people who are focused on the data we are collecting through feedback. We're harnessing data in a way that I think is powerful, through a tool called Clientele.

### **What type of data are you collecting, and how is it being used?**

We are collecting data around a number of key service standards related to how our clients perceive us, including our delivery of work and the quality of work. We're asking about metrics around technology; value; diversity, equity and inclusion; pro bono; table stakes things like responsiveness and capabilities. But then we're also collecting information on why we're selected to work on new matters and what's top of mind for our clients, so that we can look at trends around that information and respond in a meaningful way.

Last year, 94% of the clients we interviewed brought up the concept of adding value as a determining factor in outside counsel selection. That's an increase of nearly 30% year over year. It looks like the pandemic has amplified the need for law firms to be adding value to their relationships. That data tells us that we need to make sure that we continue to invest in value programs for our clients and train our attorneys and other timekeepers around what is perceived as value.

### **What are some examples of other work your team is doing?**

One example is a tech platform, a client portal that we're delivering that really helps to remove friction or barrier points in a relationship. That centers on delivery of work product and how we're being transparent around budget, cost, project management and the like.

We had a value conversation recently with one of the nation's largest transportation companies, and that yielded opportunities to support their in-house team in developing technology solutions, support related to contract life cycle management, and advising on the launch of an outside counsel scorecard program for them as well. Scorecards are something I've been talking to a lot of clients about. They're proactively issuing a scorecard to their firms. I'm helping some firm clients develop best practices around metrics in how they assess and look at the firms they're working with.

### **It sounds like you're acting in a consulting role in a way.**

More and more of that is happening. As of last week there are six different firm clients who have asked me to help them refine best practices around scorecards and client feedback. But like I said earlier, we do uncover a number of opportunities for other administrative departments in the firm to add value to our relationships. And sometimes it can look like a consulting engagement.

We have a significant client in health sciences who has engaged us to work on five different projects with them over the next 12 to 18 months that will run the scope from helping to move the needle around their diversity, equity and inclusion efforts, through some data projects, and alternative legal service solution projects as well.

### **What is your background, and how do you draw on the previous roles you've had in your current role?**

My background is in marketing and business development for a management consultancy and law firms. Prior to the merger, at Pepper Hamilton, I was really interested in the voice of the client, understanding what they say about us and how we can use that to improve service and grow our share of work. It's five times more expensive to acquire a new client than it is to grow a relationship you have. I spent years creating a best-in-class client listening program that created a culture and habit of collecting feedback from our clients.

With the merger I saw an opportunity to pivot and focus on something that I think is a differentiator for this firm. Traditionally, the client experience, customer service, conversations about value are the chief marketing officer's or chief business development officer's purview at the firm. But their ability to focus on doing those things well is competing with lots of other things, like the traditional blocking and tackling around business development, the day-to-day marketing activities. And I'm a big believer that when you ask people to focus on doing a handful of things well, they can be much more successful than when you ask them to take on too much.

### **Now that the office has been around for nearly two years, do you have any results to report?**

For sure. We consistently get feedback from clients on how much they value our approach, in terms of it being a differentiator for the firm and helpful to them. We also track the correlation between that and revenue growth.

One of our biggest success stories last year was a real estate client who we led through a client listening and value program. By the end of that year we saw a 63% increase of revenue from the client. And those are significant dollars. I mentioned earlier about a transportation company where we've advised them on some different offerings around contract life cycle management and have been hired for two new significant transactional matters as a result of slowly having value-based conversations with them over the course of the year.

It's really a cool job. It's very nice to be in a role where you're helping people.

--Editing by Brian Baresch.