

# Five Tips for Adding Value to Legal Clients' Experience in 2023

## Client Experience Corner

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2022 was a year of transition, with law firms and clients moving into a new post-pandemic phase while dealing with rising inflation and global uncertainty. Throughout this time, we have been working with clients of all sizes to collect feedback.

With a possible recession on the horizon and legal departments facing new challenges, we are watching some key trends in the legal industry for 2023. Below is our take on what will shape law firm and in-house strategies in the new year, and tips for how attorneys can leverage these trends for a better client experience.

### 1. Track and Quantify Value

Last year, we identified value as a top trend in the legal industry.<sup>[1]</sup> We noted that more clients were asking law firms to explain how they would add value to the relationship outside traditional legal services — from using technology to improve service delivery to offering bespoke training.

For 2023, we expect this focus on value to continue, and with increased rigor and process. We're predicting that more clients will take an approach to value that mirrors what they have done with diversity, equity and inclusion. Clients will move beyond just asking firms about value and will begin measuring, in hours and dollars, what firms deliver and how they stack up against each other.

Proactively provide your clients with updates on how you are adding value in ways that are meaningful to the client, like sharing legal developments and best practices. Track the time you spend on value-adds, like continuing legal education programs, pro bono partnerships and office hours, and include it as a no-cost item on your bills. Every quarter, have a relationship status meeting with clients where you share a report on significant achievements and ways you have added value in the last few months.

### 2. Increase Influence of Legal Operations

In 2022, we continued to see clients investing more in their in-house legal operations functions. From expanding

teams to engaging in new projects to improve efficiencies, legal ops continues to grow and increasingly play a leading role in hiring decisions.

With a possible recession looming for 2023, we expect clients will rely even more heavily on their legal ops teams to manage outside counsel relationships and legal spending. One way they will do this is by evaluating internal processes to identify opportunities for improvement when working with outside counsel.

Look for ways to add value to clients' legal ops teams. Connect them with operations professionals at other clients and with your business teams, offer training and resources, and provide feedback on process improvements they should implement.

### **3. Double Down on Industry Expertise**

One of the biggest political developments of 2022 was the passage of the Inflation Reduction Act, which will transform the energy industry for the next decade. Meanwhile, in the financial services industry, the collapse of FTX Trading Ltd. has insiders wondering about the future of the crypto market and how companies and investors will be affected.

Law firm clients are increasingly looking for outside counsel to have deep industry expertise to help them navigate these changing conditions. Clients want attorneys who not only know the law, but who also know the other players in the industry and what their priorities and strategies are. Clients then expect attorneys to use this industry expertise to provide proactive advice on future challenges and opportunities that may affect the business.

Identify the key industries where you have expertise and set up recurring, off-the-clock meetings with clients in these industries to discuss trends and new developments. Share what you are seeing from a practical perspective, with insight into how it affects the client and what they should do next.

### **4. Support Changing Roles of Law Firm Business Professionals**

One of 2022's most interesting law firm stories discussed how law firm business professionals were moving to new firms as a group — similar to lateral attorney moves. This sparked a series of articles in the legal press about the role of law firm business professionals and how firms could better utilize their unique value.[\[2\]](#)

In the next year, we expect forward-looking firms to support and encourage projects that allow their business teams to strengthen and grow client relationships. Law firm business professionals who previously focused more on internal operations likely will be asked to examine how they can improve the firm's service to clients.

Look for ways to involve your firm's business professionals in client projects, whether that's asking your IT and innovation teams to offer best practices on implementing a new technology or including your pricing team in meetings with clients. Engage your firm's pro bono and diversity teams to help clients meet their internal goals in these areas.

### **5. Establish Yourself as a Flexible, Trusted Adviser**

If the last three years have taught us anything, it's to expect the unexpected. In 2023, most analysts predict a recession — but the length and severity of that recession is still unknown. Likewise, many are expecting the new split Congress to result in change, but the practical effects are still unclear. Now, more than ever, clients need outside lawyers to be nimble — able to handle anything and pivot quickly.

The strongest attorney-client relationships are those where the client feels she can call at any time, about any issue, and the attorney will either help or find someone who can. These trusted advisers are also open to change and willing to adjust engagements based on what works best for the client and their business.

Set up meetings with key clients at least quarterly to check in on the relationship. Instead of focusing on open matters, ask clients for more general feedback on how they view the relationship. Ask about their priorities and whether anything has changed recently, including questions about budget. If the client is facing new or different challenges, look for ways to address their changed circumstances.

## Conclusion

If the last three years have taught us anything, it's to expect the unexpected. But no matter what happens in 2023, smart attorneys can take steps now to strengthen and grow client relationships by focusing on key ways to improve the client experience. Begin the new year with a relationship check-in call with your clients and ask them about their needs and priorities, then review the tips above to figure out which steps you can take to better serve your clients this year.

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[1] Daniel P. Pulka, “What I Learned From Meeting With 100 Clients,” <https://www.troutman.com/insights/what-i-learned-from-meeting-with-100-clients.html>.

[2] “Marketing Team Exits Cooley for Fried Frank, Highlighting Competitive Landscape for Business Pros,” <https://www.law.com/americanlawyer/2022/10/13/marketing-team-exits-cooley-for-fried-frank-highlighting-competitive-landscape-for-business-pros/>; “Fried Frank Sparks the Great Legal Marketing Validation,” <https://bticonsulting.com/themadclientist/fried-frank-sparks-the-great-legal-marketing-validation>; “Law.com Trendspotter: Law Firm Business Pros Are More Valuable Than Ever, And Yet Still Undervalued,” <https://www.law.com/2022/11/08/law-com-trendspotter-law-firm-business-pros-are-more-valuable-than-ever-and-yet-still-undervalued/>; “Talking Trendspotter: It's the Entire Legal Industry's Responsibility to Recognize the Value of Business Pros,” <https://www.law.com/2022/11/30/talking-trendspotter-its-the-entire-legal-industrys-responsibility-to-recognize-the-value-of-business-pros/?slreturn=20221108182551>.