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Five Ways for Associates to Add Value

Client Care Corner

WRITTEN BY

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This month, Troutman Pepper held its first associates retreat. The event included plenty of time for associates to build relationships in person after two years of remote working, as well as substantive programming to help them enhance their practice and learn more about the firm.

I had the privilege of attending the retreat and presenting on “The Value of Value.” In our session, we discussed clients’ increasing focus on value and how the Client Care Office is working with associates to address clients’ needs and provide exceptional service.

Several associates who attended my session also attended a panel with Troutman Pepper alumni who now work in-house. They told me that the sessions mirrored each other, with in-house counsel emphasizing the importance of value and how associates can build strong client relationships.

Below are a few of the suggestions I shared with associates on how they can add value. (Tip: They’re relevant for partners and counsel, too!)

1. Understand a client’s communication and work product preferences — and share them with your team.

One of the easiest ways for associates to provide value is by tailoring your communication and work product to your clients’ preferences. If a client prefers phone calls over emails, be sure to call them with updates. If they ask for an executive summary at the top of each memo, make sure that is always included. As you learn about a client’s preferences, share them with your team to ensure the client receives a consistent level of service.

When it comes to preferences, it’s important to remember your clients may be internal, too. Whether it’s a partner who wants daily status updates or a senior associate who loves the Oxford comma, tailoring your work to these preferences will decrease friction and build strong relationships.

2. Learn about a client’s business and industry — and share relevant news and updates.

In feedback interviews, clients often tell us that the best way to provide value is by looking around corners and sharing proactive insights and advice. Associates can take an active role in this process, but you need to understand the client’s business and industry first.

Set up news alerts for yourself on key clients, read their public filings, and ask questions in meetings about the

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client's priorities and goals. As you learn more about the client, look for news that may affect them — like newly issued regulations and court decisions and developments involving their competitors. Share the news with the client and your internal team, and always be sure to include context as to why it matters.

3. Help prepare CLE classes, training, and client alerts — and tailor them to your clients' needs.

In-house teams have many competing demands for their time and budget dollars, and often find that they need to go outside the company for training. By developing tailored training and thought leadership for clients, you not only provide value to in-house teams — you also enhance your own knowledge of the key issues and trends affecting clients.

CLEs and articles have internal benefits, too. By working with partners and other associates on these materials, you provide value to your internal clients and develop stronger relationships that lead to work opportunities.

4. Look for ways to improve efficiencies, including via technology.

Associates are often in a unique position to identify better ways of working. Unburdened by years of ingrained habits, associates can spot inefficiencies in processes and provide value by suggesting improvements that save time and enhance work product. At Troutman Pepper, one way we do this is by developing bespoke technology solutions in partnership with our Innovation team. Associates often take a lead role in building web-based and mobile solutions for clients and internal teams that improve communication, foster collaboration, and streamline task and deadline management.

5. Share what you learn from other clients.

In feedback interviews, clients regularly tell us how much they value lawyers who can apply learnings from one client to another. Associates can start integrating this habit into their practices early in their careers. If you see one client facing regulatory scrutiny, consider how other clients may wish to prepare to face the same scrutiny. If you write a client alert tailored for one client, think about whether other clients in the same industry may also be interested in the topic.

Meet Dan Pulka

As Chief Client Care Officer, Dan leads a group of dedicated client care team members who focus on providing value to clients, developing creative and innovative solutions to clients' needs, and ensuring all clients receive consistently excellent service. Dan has more than 20 years of experience in leading marketing, business development, and client experience efforts for professional services firms. He has launched law firm client feedback and key client programs, worked with attorneys to build new multidisciplinary practices, developed client-facing products and technology solutions, and incorporated client care into attorney and practice group business planning.

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