

Top Takeaways for the Legal Industry From Qualtrics' X4 Conference

Client Experience Corner

WRITTEN BY

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Last week, thousands of experience management professionals gathered in Salt Lake City for the [Qualtrics X4 Summit](#) — the largest conference dedicated to customer and employee experience. Members of Troutman Pepper's [client experience team](#) attended to uncover new ways we can serve our clients better and to share how our attorneys are putting the client experience front and center.

I'm still digesting all the great content from last week, but here are my top takeaways from X4 and tips for how lawyers can implement them.

Ask for real-time feedback regularly and close the loop.

When you attend a multiday conference, you can expect a post-conference survey asking for feedback to improve the event next year. At X4, however, we received a survey at the end of each day and could submit feedback at any time through the event's mobile app. This allowed the [Qualtrics](#) team to identify and solve issues quickly and in real time.

One example: During Wednesday's sessions, soft drinks were plentiful, but water was hard to find. We shared that feedback, and, by Thursday, water stations had appeared throughout the convention center.

Tip: Don't wait until an annual survey or the end of a matter to solicit client feedback — you may find it's too late to address an issue. Instead, establish listening posts at regular intervals to see what's working and what's not working. When a client identifies a problem or area of improvement, close the feedback loop by addressing it immediately and sharing your solution with the client.

To improve the client experience, focus on what you can control.

Qualtrics founder and Utah Jazz owner [Ryan Smith](#) spoke on the main stage about the fan experience at Jazz games. He noted that, when the Jazz won, fans were willing to pay 22% more for their tickets than when the team lost. But whether the team wins or loses is something that can't be controlled.

When you can't control your product, Smith said, you must focus on "the experience moat" — all the controllable things that surround the product. For him, that meant projects like improving concessions or ensuring a clean stadium.

Tip: The practice of law can sometimes feel like an NBA game. Despite your best efforts, a court may rule against your client or a deal may be broken at the last minute. When you can't control the outcome of a matter, it becomes even more important to focus on the aspects of the client experience you can control. Ensure timely and responsive communications. Deliver the best possible work product. Tailor your approach to your client's preferences, and look for new ways to add value.

Make decisions based on what's right for the client, not your bottom line.

Delta Air Lines CEO Ed Bastian is a leader in the field of customer experience and spoke at X4 about how the airline builds strong relationships with its customers. One example is Delta's initiative to make Wi-Fi free on all flights, which required the company to invest significant funds to upgrade the technology on its planes. Bastian spoke about how Delta's board of directors thought the idea was crazy — until they saw the outpouring of positive feedback from customers.

Bastian noted that projects like free Wi-Fi create strong bonds between customers and Delta. And while the company's goal is to improve the customer experience, this customer-first approach brings financial benefits too, as customers are willing to pay more to fly with the airline they like best.

Tip: You don't need to spend a billion dollars on technology to build a stronger relationship with your clients. Think of ways you can invest your time and resources to improve client experiences. Consider offering a CLE on a hot topic or holding off-the-clock office hours. For a new or prospective client, offer to get up to speed on their business or their matter at no cost to them.

Look ahead to stay relevant with clients.

One of the highlights of X4 was a keynote discussion with Martha Stewart. At 81 years old and nearly 50 years after starting her first catering business, Stewart is as beloved as ever. She credits her enduring popularity to a lifelong commitment to learning, a willingness to embrace technology, and her constant efforts to understand what is relevant to her audience today, tomorrow, and next year.

As one example, Stewart pointed to her longstanding relationship with Macy's. For years, her products were bestsellers, but the agreement precluded her from selling in online marketplaces like Amazon. She knew she had to increase her online reach to stay relevant with customers today and made the difficult decision to not renew her Macy's deal. The result was a significant increase in sales.

Tip: Clients consistently tell us that providing proactive advice is the best way for attorneys to differentiate themselves. They need smart outside counsel who can see around corners, identify possible blind spots, and provide forward-looking, commercially focused advice. Calendar some recurring time for yourself to devote to blue-sky thinking. Eliminate distractions and give yourself the space to think through the issues your clients may face in the future and how you would advise them. Then follow up with key clients to share these insights.

Find ways to surprise and delight your clients.

One of my favorite aspects of X4 was the Dream Team, a group of Qualtrics employees dedicated to closing

experience gaps at the conference and making the event memorable for attendees. In a pre-conference survey and in the event mobile app, attendees were asked what would make X4 unforgettable for them. The Dream Team reviewed the requests and then figured out how to make these dreams come true.

Importantly, the Dream Team didn't just provide what attendees asked for in their requests — they looked for ways to go beyond the request to surprise and delight attendees. (Because as we learned at the conference, “people are not able to articulate what would surprise and delight them.”) For example, two attendees submitted a request that they wanted to ski while in Utah and also hoped to make a friend at the conference. The Dream Team arranged for both to go skiing together, and outfitted them in the latest gear from Olympic snowboarder Shaun White. I was also lucky to be granted a dream: I asked for a good spot to watch the closing concert from my favorite band, The Killers. The Dream Team went above and beyond, granting me a meet-and greet and creating a truly unforgettable experience.

Tip: Remember that clients are people too and have diverse interests and needs. You may not have access to your client's favorite celebrity, but you can find other ways to surprise and delight them. Consider sending a small gift when they start a new position, recommending books or movies you know they will enjoy, or sending a handwritten thank you note in appreciation of your relationship. Remember key personal details like children and spouses and look for ways to engage on a personal, human level.