

Vital topics

A series of four workshops on the latest client relationship management approaches of the worlds' most successful law firms



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The latest client relationship approaches of the world's most successful law firms

The last few years have created a tough competitive landscape for most professional services firms – one where clients continually review the quality and cost of their adviser relationships.

Despite more positive economic forecasts, law firms face continued pressure to produce greater value and exceptional service delivery. For most firms, how you manage the client relationship is as important as delivering the technical side of an assignment, case or project.

As the economy changes, technology evolves and business practices adapt, how can you safeguard your client revenues and gain repeat and new instructions?

Best practice workshops

In this Vital Topics series we have devised four short and highly practical workshops that share the latest client relationship management approaches of today's most successful firms:

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Duration and location

Each workshop lasts 2.5 hours and is designed for groups of up to 20 delegates at their firm's premises or other venue of choice.

Guide to investment

Each workshop is bespoke to the team involved through up-front discussion on areas of greatest focus. Your investment is £2,500 per workshop excluding VAT and out of pocket expenses.

Programme leaders

The workshops are led by Ali Helliwell and/ or Claire Offord of The Results Consultancy

Ali Helliwell

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Claire Offord

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For more information

If you would like to learn more about our **Vital Topics** series and how the workshops may enhance your firm's client relationship management approach, please call me on tel **+44 (0) 20 7488 4419** or email me at **john.timperley@winningbusiness.net**

Kind regards



John Timperley

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Vital topic 1

Bringing real innovation to your client relationship management

The role of lawyers is changing rapidly. Legal expertise alone is no longer enough to win more work. As in-house counsel become more sophisticated in leveraging law firm relationships against a backdrop of tightening costs and new players in the market, sticking to the old ways of doing things is unrealistic. To stand out in an increasingly crowded market, firms need to anticipate change, challenge existing approaches and be innovative in every aspect of how they manage their client relationships.

The workshop covers	What you will gain
<ul style="list-style-type: none">• What we mean by the term innovation• Where there is scope to innovate within your existing framework for managing client relationships, looking particularly at the following areas:<ul style="list-style-type: none">– Structure and governance around relationship teams– Value added services - ways to turn key aspects of your firm to become client facing– A fresh look at ways to inject creativity into existing value added offerings– Pricing and fee arrangements – new approaches to pricing structures and negotiation– Cost efficiencies – identifying the types of project that you can implement to increase efficiencies, reduce costs and ultimately enhance your working relationship with the client– Client feedback – the latest thinking and innovation around how to prepare for, host and follow up on a stand out relationship review• Challenges in implementing new approaches• Risks for law firms that fail to change.	<ol style="list-style-type: none">1. A greater insight into innovative client relationship management in the legal sector2. Ideas on how to take key aspects of your client relationship management to a new level to differentiate from others3. How to tackle some of the challenges you may face in implementing new approaches4. A perspective on the dangers of not embracing creativity and change in the current environment.

Vital topic 2

Building competitive advantage through client relationship reviews

From our research, the vast majority of the most successful law firms say that their client relationship review meetings are critical to their success in securing continued client loyalty.

In this workshop we examine the latest 'best practice' and innovative ways in which firms are developing their client relationship review approach. The workshop highlights the techniques used by some of the most forward-thinking and impressive Client Relationship Partners and shares practical approaches from others – both within the legal sector and within other professional services firms - that all law firms can easily adopt.

The workshop covers	What you will gain
<ul style="list-style-type: none">• The ingredients of an exceptionally good relationship review• Using client listening techniques to effectively inform client development actions• The practical do's and don'ts of client relationship reviews• The eight steps to stand out from others when conducting reviews• Following up the review – relationship enhancing strategies• Innovations from the best, such as 'shared vision' relationship planning. Can you do it?	<ol style="list-style-type: none">1. An understanding of the different kinds of client review meetings from informal through to structured and how to make the most of each2. An understanding of what a great client review meeting looks like from the client's perspective3. How to use 'client listening' skills to really engage the client4. How to benchmark your approach against others in the sector5. Ideas for innovation and creative thinking in follow up6. Why client-led relationship planning is much more powerful than assumptions-based relationship planning.

Vital topic 3

Adding real value – current 'best practice' strategies in the legal sector

Value added services have become a 'hygiene factor' for clients as budgets tighten and they constantly look for ways to leverage relationships with their legal advisers. Law firms are investing heavily in client relationships against a backdrop of a squeeze on fees - often with no immediate return on investment.

The challenge for firms is to identify ways of differentiating their service offerings. Invariably firms are providing similar training, helplines, publications, online services and secondments. At the same time, clients say they can get hold of the usual value added services easily – but it is often the things that you do every day within your businesses that clients would benefit from having access to.

We believe there are opportunities to share some of the expertise you hold in operational functions to become truly client-facing and to partner with the client to help strengthen and deepen the relationship in new ways. The most forward looking professional service firms are already doing this – can you?

The workshop covers

- Evaluating typical value added services - and what the client really values
- How to turn all aspects of your organisation to become client-facing - a review of various operational functions to identify value added service offerings within e.g. Finance, IT, HR, Training, PR, Know-how, Information Services etc.
- What a client-facing firm really looks like in terms of structure and behaviours
- What you can do to engage your operational teams
- How to measure the value you bring to the client
- Delivering exceptional 'value added reporting' to the client.

What you will gain

1. The core insight that value-added services don't have to be a huge investment – they may already exist within your business
2. A clear picture of how operational functions can become more client-facing
3. Ways to partner with your clients to create innovative value added offerings
4. The steps needed to engage and make operational functions become client-facing
5. How to draft an exceptional value added report for the client.

Vital topic 4

Managing relationships with procurement to win and retain high value work

How do you best manage the relationship when procurement is involved in the purchasing decision – and achieve a good outcome on pricing?

This workshop aims to further enhance senior legal professionals' knowledge of legal procurement, and better understand how their clients are being advised 'behind the scenes' by procurement professionals.

This Vital Topic session has been structured to enable delegates to gain first hand insight from senior procurement professionals.

The workshop covers

- **Understanding the legal procurement expert's role**
– Reporting structures, how they are measured, what do they do, enjoyable/frustrating aspects of their job, how they regard law firms and what do they want to achieve with them
- **Procurements involvement throughout the RFP/ Panel process** – Scoping of documents, selection criteria at RFP stage, the pitch process, managing legal panel relationships, ongoing panel management
- **Backing the right clients** – How to select clients you can win and retain, key relationship essentials to safeguarding the relationships
- **What do the questions behind RFPs really mean**
– How to get to the key requirements and personal agendas, what procurement are looking for... and what they're not
- **Value-added services and measuring value** – Are value-added services worth the investment, do they get you more work, how do procurement measure value, how should you measure value and what is the best policy with costly secondments?

What you will gain

1. A deeper understanding of the role of procurement and how they influence decision making
2. Ways in which you can build better relationships with the procurement professionals advising your clients
3. Strategies to identify which clients are really worth investing in - sometimes resources are spread too thinly and procurement professionals see through this
4. Insight into what impresses procurement and what doesn't
5. Approaches to the value-added services and relationship investment activities you can employ
6. Know how procurement professionals measure value - and how you should measure value and play it back to the client.



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