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MANAGEMENT

No 'Wiggle' Room When It Comes to Your Personal Touch

By Jamie Mulholland

I just went to a concert by — get ready — The Wiggles, with whom my two-year-old is obsessed. I was curious to see how the show would play out, since after I bought the tickets the group announced that this tour would be their last, with three Wiggles retiring after 21 years and handing over their colorful shirts to new performers. I feared we would end up at the show and unable to see the original four.

As I understand it, in past tours they have used stand-ins for the main performers for various reasons (medical, personal, whatever). Also, I suspected that they might want to introduce the new Wiggles during the tour. After all, many two-year-olds couldn't care less who is wearing the red shirt, so long as he is singing "Hot Potato." And, in thinking more, I wondered if I myself would care, since what used to be four guys singing cute little ditties on a stage has evolved into a multimillion-dollar traveling production featuring elaborate sets and dozens of performers and musicians. But then I realized I would, actually, be disappointed if that happened; at the end of the day, no matter how great the production, our only reason for going was the talent at the center of it all.

In my work, attorneys and I focus a great deal on opportunities to connect with audiences, especially in unexpected places. Of course, emails, articles and newsletters are a staple in keeping the firm "top of mind" to clients, potential clients and referral sources. However, there are countless occasions where a firm can include or improve a brand message in vehicles where audiences least expect it, giving the message greater impact.

For example, billing forms and other administrative processes are often seen as pure business communications; however, the marketing impact potential there is huge. Paying extra attention to the design, the messages contained outside of the business detail and how they are delivered can make all the difference in the world to the eye of the beholder. And, while effective overall marketing and administration can indeed come together seamlessly to build your practice and create a fantastic production in the eyes of a client, it is important to keep looking for these opportunities in every operational level of the firm and putting your personal stamp on them, because assuming they will run well on their own can cause you to lose some fans.

Recently, I was charged with coordinating estate and probate work for a family member and asked the funeral director for the name of an attorney he would recommend. "Jane Doe is great," he offered.

So I searched Jane's name on the Internet and checked out her firm's website. Impressed with her credentials, I called the office, explaining how I was referred and asking to set up an appointment with Ms. Doe. "Well," replied the receptionist, "John Doe, another one of our attorneys, is also taking estate work."

Confused, I asked, "Is Jane not accepting new clients?"

"Yes, but John is, too," she offered.

Already familiar with the detail my contact had shared with me and Jane's background, I politely pressed her. "Perhaps I can meet John when I'm in the office and he can handle some of the work if it's delegated, but I'd really like to start by sitting down with Jane." I offered some days and times that I could meet and received a return call the next day.

"John is available on all of the days you gave me," said the receptionist.

Dumbfounded, I asked why the appointment would not be with Ms. Doe. "Because John saw the message I left for her and said to call you with his availability."

I thanked her for her time and hung up.

Two things alarmed me: the absolute lack of etiquette and the fact that here was a named partner who may have no idea that this exchange ever occurred. Does she know how intakes are handled at her firm? Does she give input on other firm administrative processes? I hope the answer is no, because I can't imagine there is an attorney anywhere who allows such an important contact point to be flawed so dramatically, nor do they want to lose the

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potential future referrals from that person, whether or not they choose to retain the firm.

Now, the most alarming question of all: Could this happen at your firm?

Do you know exactly what is said to prospective clients when they call? How are calls referred internally? How are internal referrals measured? What is the post-call, pre-appointment follow-up to remind the individual that he or she has made the right choice by picking up the phone?

I asked some colleagues to give me some feedback on the experience. Here are some fantastic examples of firm- and client-centric initiatives that they shared and you can implement today:

• *A checklist.* A healthy-but-not-overwhelming combination of steps for the receptionist or assistant to follow to help ensure the initial critical questions are asked, important firm information relayed and specific steps provided for the staffer on what to do next — how to transfer the call internally and to whom, how to record same for firm analysis, and what materials should be mailed to the individual prior to their meeting (such as a "Welcome" or "About the Firm" brochure or flyer).

This is the easiest of lists to create. Simply ask yourself, "What do I want done when a new client calls the firm?" and "How would I want to be treated if I were a potential client?"

• *A basic informational form.* You cannot always guarantee that whoever speaks to the potential client will remember to record all pertinent details. Lay out specific questions so that important information is documented from the first contact. As this is separate from the new matter form (obviously more detailed), this form simply creates a general picture of the potential client by combining basic contact information with other helpful details, such as whether they have consulted another attorney on the matter.

• *A script.* Some people are uncomfortable giving information to anyone but an attorney. Providing specific language for the receptionist to read from might create a more comfortable verbal environment for the potential client to make them more forthcoming: "I'm delighted to set your appointment with Ms. Doe to discuss your wrongful termination matter. She will want to know your supervisor's name and last date of work. Can you give me that information for her?" This positions the administrative person as the direct link between the client and attorney, not an obstacle between them.

• *A call report.* A quick form noting the name of potential clients, the time they called and to whom they were referred. Reports can later be analyzed by busy times of day or during the year where additional phone support may be needed; the source of how the individual came to contact the firm and whether an outreach or advertising campaign paid off; and to ensure that inquiries are routed fairly internally.

• *A regular revisiting of the process.* Set a calendar reminder (perhaps at the annual retreat) to review and revise the process. How does it fit your needs? What can be added, changed or removed to make it more efficient? Who can better fill the various roles? I know a firm that recently moved a paralegal to the receptionist role with great success. She had the legal know-how to speak to clients, could back up attorneys during down time and could quickly establish a pleasant and professional rapport with virtually any caller.

In short, how a firm handles administrative contact shows audiences how it handles work: with care and attention to detail, or disorganization and indifference. And you don't have to be a large firm to establish a strong administrative process. You just have to be in touch with it.

I'm delighted to report that the Wiggles were fantastic. There were just a handful of backup performers (including the new Wiggles) but the four original group members were completely the focus of the show. Each one took turns actually walking through the audience while the others sang, stopping for photos, shaking hands and interacting with families (the yellow Wiggle offered my daughter a high-five and she stuck her tongue out at him). They sang all of the original cute little ditties that made them famous and at one point paused between songs to read every poster within eyesight that kids had made for the show. Can you imagine that?

Now, to be fair, I know I'm not talking about Bruce Springsteen, but think about it. Four incredibly successful performers with a global reach that could, if they chose, allow them to play for an hour, leave the stage and cash their checks. But they didn't. They chose to establish an intimacy with the audience and remind everyone that they have not forgotten the pint-sized individuals who are the focus of what they do and the reason for that success.

There are studies upon studies about the influencing factors that land and keep clients. However, like the greatest of stage productions, even though the lights and music and supporting staff add to the show, if you, as the talent, make an effort to connect with your audience, you will keep them as fans for years to come. ■