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Above and Beyond: Delivering Excellent Client Service

Abstract: Client service skills are the human side of the work of an information professional. Whatever type of legal research environment we work in, our internal clients will expect that we have the right technical skills to support their work. But technical excellence in our day-to-day professional lives will amount to nothing if we cannot also deliver excellent client service. The benefit derived from this will be a more relevant research service, powered by experts, while the profile of the services provided will also be raised. In this article **Jas Breslin** aims to set out some of the behaviours that can be used to build a rapport and trust with clients, so that they can benefit from an information team that better understands their needs.
Keywords: information professionals; marketing; communication; clients

INTRODUCTION

What makes you return to a certain restaurant again and again. Is it just the food or the drinks they have available? Or is there something more, something extra that you like about the place? Do they make you feel welcome, by smiling and paying attention when you come through the door? Do the staff have a pleasant attitude? When you can't decide between the fish and chips or the beef pie do they talk you though the options and make a recommendation? Even better, when you walk through the door, do they already know what you want to drink or what table you want to sit at? Could it be that the people and service they are providing makes you feel a particular way? Makes you feel like a valued customer? Makes you feel special, individual, and understood?

While it might seem trite to compare the work that we as information professionals do with dishing out pie and beers, it is important to remember that great customer service has the same foundations whatever your product or service is. And for information professionals, the colleagues that we work with, whether they are partners, trainees, or business development professionals, are all our clients, and for the sake of our very existence we need to ensure that they are satisfied customers, so that they return again and again to use the services we offer.

The objective of this article is to set out *why* it's important to deliver the best service experience possible and to provide some practical tips on *how* to deliver on that top notch service to our clients. The article will also aim to set out some of the behaviours we can use to build a rapport and trust with our clients, so that they will benefit from a research and library team that better understands their needs, while at the same time effectively promoting the services we have to offer.

Here we will focus on client service skills within the information services environment in law firms. In this setting clients are usually lawyers or business service teams such as the business development and marketing team or knowledge team. However, what's important to remember is that whatever type of environment you work in, your clients will already expect that you have the right technical skills to support their work. But technical excellence in our day-to-day professional lives will amount to nothing if we cannot also deliver that excellent client service experience.

WHAT IS EXCELLENT CLIENT EXPERIENCE?

Excellent client service is built on proactivity, exceeding expectations and building trust. I've picked out two quotations (below) that embody what excellent client experience should be, identifying that in our roles we can exceed expectations in unexpected ways and that we should aim to connect with people on a human level in order to be successful in this objective.

"The key is to set realistic customer expectations, and then not to just meet them, but to exceed them — preferably in unexpected and helpful ways."
Richard Branson, businessman and entrepreneur

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"When dealing with people, remember you are not dealing with creatures of logic, but creatures of emotion."
Dale Carnegie, author of *How to Win Friends and Influence People*, first published in 1936

It's highly likely that you will already have noticed that some of your clients will always come directly to you for assistance, even if there is a central contact email address they could (or should!) use. Quite apart from being flattering, this is important because it demonstrates that at some point in the past you have made a positive impact during your interactions with that person, and they trust you to do the same again. So, how do you or your team get to this stage where your clients trust you and return for more of the same?

WHY IS EXCELLENT CLIENT SERVICE SO IMPORTANT?

To begin with, let's start with a question that might seem obvious but is often overlooked: what is customer service and why is it so important?

A team of researchers who can provide a list of authorities or check if a section of an act is in force, or run case searches, is exactly what you'd expect from a legal research team in a law firm. But what if that team is hard to get hold of? Or what if they take too long to respond to a request or miss a deadline, how does that make the lawyer feel? If the lawyer must chase up to check if someone is dealing with their request, or why one bullet point on the brief was not answered, then how happy are they going to be with the support they have received? Will they come away from that interaction feeling content and satisfied? Or will they feel neglected? If they come away feeling ignored or disappointed it may lead to them questioning if you really know how to do your job, and doubting your competence. So, investing in customer service is the key to long-term success for both you and your team.

It is essential that we make our clients feel like we are servicing their specific requirements and needs and tailoring our response to their situation. Our clients want us to be interested in their work and their problems and to come up with workable solutions for them.

As has been mentioned above, lawyers already expect us to have the technical expertise and knowledge to do our jobs – and let's face it, we *are* being paid for that. But what our clients are now expecting is something more from us. They want us to understand their personal needs, and they want us to consistently meet or, better still, exceed their expectations so that they have a consistently positive experience *every time* they interact with us. And ultimately, they want this to lead to us being able to anticipate their needs and be proactive in providing services relevant to them.

There's another key reason why going the extra mile is so important. For us as information professionals, we want to be continually improving and excelling at what we do within our roles. We want to do the best job we can and bring our best self to work so that we feel fulfilled and satisfied within our roles. It's more than just doing a good job and helping people. For many of us who work in the information profession, one of the key areas that we value most highly is the continuous learning we encounter in our jobs. We thrive on exploring every research task with curiosity and ferreting out information that others can't find or don't have the patience or experience to find, and along the way learning about new websites, new areas of law or a new technology tool. The resulting satisfaction and gratification we feel is hugely important to us.

On a team level, our research and information teams are supplying a service, we have a clear purpose to support the business and the firm's clients, so we should do that in the best possible way we can. We should want to feel like we are making a difference and adding value and we should embed that into our team strategy.

In addition, we can use emotional intelligence to understand our client's perspective so we can build that rapport. That means listening carefully and understanding the request as well as its context; both the business context – perhaps how they need to use the information they have requested – and the human context – for example, they might be under pressure to get out three client briefs before the end of the day, and that's why they have such a tight turnaround time.

Investing time and effort in building rapport and trust with clients, whoever they are, will lead to a better understanding of their needs with the ability to provide a more proactive service, and will build a more positive reputation for your team's services.

Rapport, trust and raising the profile of the services on offer will then encourage repeat business, repeat requests for support, and this in turn will help to ensure the successful survival of the team within your organisation. After all, if no one is using the researchers and if no one is using any of the resources purchased for the organisation, then there's not going to be a need for staff to respond to those requests or manage the collections.

HOW DO YOU DELIVER GREAT CLIENT SERVICE?

But what does it mean to provide great client service, and how can you ensure that every person has a great experience when they reach out for help? Here are some practical tips which focus on building trust and rapport as the foundation for delivering great client service.

BE APPROACHABLE

One of the key behaviours we should display is an attitude of positivity and approachability. Everyone has to juggle multiple tasks and projects in their working day

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Figure 1: Tips for building trust and rapport

but when a request for assistance comes in, it is important to respond positively, quickly and with interest.

Think about when you walk into that pub or restaurant – you want the staff to make eye contact and smile, and to ask you what you want to order. The last thing you want is for them to ignore you and wander off leaving you waiting. In the best-case scenario, you'll get frustrated as you wait for attention; and in the worst-case scenario you may walk out of the place and never return. And the same goes for busy lawyers contacting your research team.

KEEP IN THE LOOP

Keep your client in the loop and actively manage client expectations. If you are working for someone for the first time, or if they are new to the firm, you may need to set out the expectations of what you can do for them and check that this approach works for them. For example, if someone sends in a complex legal research request and it sounds like they want you to make some interpretations of how the law works in practice, you can explain that although you are not legally qualified (if you aren't), you are however an expert in information management and retrieval so you can find the information that they need, and then they can make their own interpretation of those laws.

Communication is also key here, and if you need more information or background context to the request then ask for it. If the deadline is not possible then flag this up early on, and always offer alternatives that you can deliver on. Also, picking up the phone to get a quick answer can ensure you can maximise the time available on those rush requests, while it shows that you care and understand the urgency.

PROBLEM SOLVE

Creatively problem solve and make it central to your support role – because there are always going to be problems to solve. Our clients want us to be interested in their work and their challenges, and they will come to us and expect us to come up with workable solutions.

If the database the lawyer wants to get into is down, think about what other resources your firm subscribes to that could be useful. If you don't subscribe to a particular journal, what other articles are out there on the same topic? When that copy of the library book is missing, see if it's possible to buy or borrow it from elsewhere.

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RESPOND QUICKLY

Understand that valuing other people's time is crucial, and this is even more true within a law firm environment. You should look at answering queries as quickly as possible – particularly smaller queries that don't take a lot of time. Be communicative and reply promptly, even if it's just with a holding message.

Lawyers know that it can take time to collate the right response for complicated requests, they just don't want to get stuck in the queue of requests without any sign of progress. They want to know that when they send in a request that it has been picked up and that the response will come back in a timely manner, and that you will ask relevant questions if they haven't provided all the information you need to get your job done.

SELF SERVICE

Self-service doesn't mean the end of customer service. Help your lawyers to help themselves. Some people don't want to email or call in to get a problem or request solved, often they want to find the information or solve the issue themselves, and in other situations you or your team may not be available. So, build a self-service function into your library service – it's an easy and cost-effective way to help keep your customers happy. For example, creating an intranet page with resources sorted by practice area, or jurisdiction, provides a straightforward way for a lawyer to start their own research on a sports law topic, or find boilerplate contract clauses. But make sure to signpost on the intranet page how to get in contact with the library team if they need more help if they can't find what they are looking for.

KEEP YOUR WORD

This next bit is crucial, and you should aim to get it right every time. If you promise something, make sure you deliver on it. This may seem like simple good manners – and it is! – but keeping your word is also about respect and trust.

Don't break your word, like saying you will respond by 3pm and then not responding until 3.30pm. As soon as you realise that you aren't going meet the deadline or if it looks like there is no straightforward answer, you should contact the requestor. Even if the message is that you are still working on the research, or that you haven't found anything on point yet and you're asking for an extension of the deadline. Missing a deadline is a surefire way of losing a loyal customer who will feel like you let them down at the first hurdle.

And be honest. If you don't have the expertise in a certain area then seek out the best qualified expert within your own team. Don't be afraid to say that the request is not appropriate for you to handle if it is something that would be better handled by the BD team or IT, or even if the lawyer is expected to do this sort of thing themselves. Honesty and candour here will help build your reputation.

Remember, it's better to under-promise and then over-deliver. Do not over-promise and under-deliver. Manage those expectations.

BE PROACTIVE

Going above and beyond, or the extra mile, is one of the most important things you can do to deliver great customer service. This is when you have ticked all the boxes, yet you still do more. The lawyer asks for a case judgment, but it's not yet available. You could just go back and say as much. Or you could be proactive and see if there are any articles or blog posts that summarise the case, and also offer to track for the future publication of the judgment.

Sometimes being proactive means anticipating your customers' needs before they even articulate them. If you know a partner is interested in a case and you see an article published on it, then send it over before they even ask for it. Think from the perspective of your lawyers and customers, and try to anticipate the needs of the people who use your services.

When customers feel like you value them – like they're truly special to you – they'll keep coming back.

BE PROUD

I have talked to a lot of information professionals over the years, and I know many agree with me that our jobs are truly rewarding, and we enjoy our work. We recognise that we provide a valuable service that people rely on, and we are rightly proud of what we do. If we are open about the pride we have in fulfilling our roles, then we can instil pride in others to want to work with us.

FEEDBACK

We are used to websites and surveys constantly asking us for feedback, and social media cries out for us to 'like' a story or comment. But fostering a culture of meaningful feedback to improve the client experience can be very valuable, and providing our clients with the opportunity to tell us what they like or don't like about our services, in a safe environment, is critically important. Gathering feedback may be done through informal conversations, or through more formal feedback surveys. Whatever the process employed, the important part is analysing the data and acting on suggestions made so you can pivot your service to be more effective.

THE BENEFITS OF EXCELLENT CLIENT SERVICE

We now live in a culture where everyone expects an excellent client service experience, and we will vote with our feet if we do not receive the service that we are expecting. Our

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lawyers and other clients want to be understood and to connect with us, and they want to build trust and rapport with us. Our aim is to meet and exceed those expectations.

All this good work will keep you and your team in a job! Raising the profile of your team's services will encourage word of mouth recommendations – and we all know that personal recommendations are the best kind, conveying the deepest layer of trust.

We all want to feel like we have made a difference and have done the best job we can. We want to feel fulfilled, satisfied and proud of our work and our colleagues.

Sometimes it can feel like an uphill effort to build up a reputation for excellent client service and it is true that it takes energy, drive and time. And beware, it's also very easy to lose that reputation through making a mistake. However, it's a very worthy objective and can be self-perpetuating if you continue to be consistent in your outputs, you are proactive, exceed expectations, and continue to build on your relationships with people within your organisation.

LAST THOUGHTS

In concluding, I end this article with a quotation from Aristotle: "We are what we repeatedly do. Excellence, therefore, is not an act but a habit."

Biography

Jas Breslin is the Head of Research & Information Services at Charles Russell Speechlys LLP where she has worked since 2015. She manages a team of information professionals and has responsibility for developing and delivering the strategy for the team, which includes legal and business research services, current awareness and training, and managing and developing the firm's collection of print and electronic resources, globally.

Jas has over 25 years of experience working in the law firm sector and is an active member of the legal information community. She has spoken at BIALL conferences and served as BIALL President in 2013 / 2014. Jas is co-editor of BIALL's *Legal Information Management* (LIM) journal.

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