

Developing Strategic Client Relationships

Executive summary

Acknowledgements

About the Author

Part 1: The Methodology for Developing Strategic Client Relationships

Chapter 1: The case for strategic client development

What do we mean by client relationship management?

Stepping back to take a strategic perspective

The Ansoff Matrix

Cross-selling

Chapter 2: Competitive analysis and the Five Forces model

Why client profitability increases over time

The changing nature of law firms and the legal services industry

Characteristics of lawyers, law firms and legal services

Chapter 3: Understanding positive illusion

The changing nature of the client

Chapter 4: Dissecting the strategic triangle

The client

The competencies and capabilities of the firm

A competitive perspective

Summarising the challenge

Choosing between law firms

Risk, trust and the importance of brand

The role of proxies in professional services

Chapter 5: Through the eyes of the client

Why a customised approach delivers results

The client relationship management organisational infrastructure

Defining and implementing the brand experience

Touch point management

Added value and pricing

Mapping potential added value

Chapter 6: Understanding service quality and gaining feedback

The SERVQUAL model of service quality gaps

Creating and using a client feedback system

Developing a framework for client relationship management

Introducing the programme

Chapter 7: Key client management

Selecting key clients

A holistic approach to key client management

The structure of a key client plan

Key client team selection

Getting the team to work like a team

The organic evolution of the team

Agreeing objectives

Chapter 8: Macro-environmental analysis and researching the client

The context

Competitive analysis

- Understanding decision making and key stakeholders
- The decision staircase
- Stakeholder relationship mapping
- Relationship strength assessment
- SWOT
- Action planning and responsibilities
- Team meetings and driving progress

Chapter 9: Personality traits of a great client developer

- Managing change to achieve effective relationship management
- Leadership and its role in driving the programme
- Creating a systems infrastructure to support client relationship management
- System implementation issues

Chapter 10: Client relationship management at a distance

- Challenges for the mid-sized firm
- Managing strategic client relationships through an international merger
- What it takes to lead the market

Part 2: Case Study Materials

Case study 1: Delivering on what you've promised – what clients are looking for in a law firm

- Are law firms credible advisers?
- How do clients establish the aptitude of a law firm?
- How do law firms develop a relationship of trusted adviser?
- How do law firms maintain their status once they have acquired a client?

Case study 2: Moving from technical excellence to business nous

- The life of a professional – shifting priorities, shifting emphasis
- What sort of training and development makes a difference?
- The new kid in town...
- Never stop learning...
- Benefits of a coordinated approach
- Make or buy decisions
- Recognition and reward

Case study 3: Delivering value in law firm billing

Case study 4: How client feedback is integral to an effective strategic CRM process

Case study 5: Implementing a successful client relationship management programme

Case study 6: The merits of offshoring business research

- Necessity: the mother of all innovations
- Large top-10 law firm case study
- Mid-sized law firm case study

Case study 7: The role of competitive intelligence in shaping strategy

- Why competitive intelligence matters
- The strategy process
- What types of competitive intelligence should be sought?
- In conclusion

Case study 8: Talking about a quiet revolution

Case study 9: CRM – Choice really matters

- The pioneers
- Second generation
- Microsoft Dynamics

CDC Pivotal
Hubbard One
e1 Business
InterAction
The confusion of choice
Conclusion

Case study 10: Engaging ... If you want get ahead, get CRM

Case study 11: IGNITE

Background
The IGNITE programme
Building skills
Focus on key clients
Creating the corporate memory and effective pitch processes
Revitalising CRM
Creating a clear sense of direction and awareness
The impact of IGNITE
Summary comments

Case study 12: Creating an environment to nurture change

Leadership
Influence and trust
Making it happen
The Promise charter
Engaging with the whole firm and embedding the Promises
Maintaining momentum and building the presence of the Promises
Reward and recognition
Key account management
Client feedback and external benchmarking
What have we learned?

Case study 13: Life outside the Premier League – Creating a compelling reason for key client management in a mid-sized law firm

The times they are a-changin'
Give me just a little more time

This time (we'll get it right)

Time is running out

Case study 14: Client relationship management at arm's-length

The Flint Bishop approach to client relationship management
'At a distance' services
Affiliate marketing projects
Communications and infrastructure
Infrastructure and processes
What is different about the Flint Bishop approach?

Case study 15: Managing client relationships through a law firm merger

Understand your clients' future needs
Tackle challenges proactively
Transparent communication
Strong key account management
Don't forget practicalities
Cross serving

Index