

A man in a hot air balloon realized he was lost. He reduced altitude and spotted a woman below. He descended further and shouted, "Excuse me, can you help me? I promised a colleague I would meet him an hour ago, but I don't know where I am."

The woman below replied, "You're in a hot air balloon hovering approximately 30 feet above the ground. You're

Seeing Through Your Clients' Eyes: Six Steps Beyond Client Surveys

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about 39 degrees south latitude and 176 degrees west longitude."¹

"You must be a lawyer," said the balloonist.

"I am," replied the woman, "How did you know?"

"Well," answered the balloonist, "I'm sure that everything you told me is technically correct, but I've no idea what to make of your information, and the fact is I'm still lost. Frankly, you've not been much help at all. If anything, you've delayed my trip."

The woman below responded, "You must be in management."

"I am," replied the balloonist, "but how did you know?"

"Well," said the woman, "you don't know where you are or where you're going. You have risen to where you are due to a large quantity of hot air. You made a promise which you've no idea how to keep, and you expect people beneath you to solve your problems. The fact is you are in exactly the same position you were in before we met, but now, somehow, it's my fault."

Client Perception Surveys

Professional managers understand the need for top-quality legal advice, yet their relationship with lawyers is often characterized by the familiar public perception: technically excellent, but expensive and difficult to manage in ways that relate directly to the business issues.

To get a better handle on the client perspective, many legal departments

and law firms regularly survey their clients. Designed and conducted well, client surveys provide useful insights, helping find ways to deliver legal services more effectively.

Relatively few programs, however, systematically enable lawyers to take the next step, beyond the usual "learning about the client perspective," sometimes seemingly conducted from an ivory tower vantage point, far removed from the clients' own experiences.

The Client Experience

The client experience of what front line managers and staff actually do in their job, day-by-day, offers some of the most valuable insights into ways of delivering more effective legal services, and a deeper understanding of the context in which the organization operates.

With lawyers often functioning at the most senior levels, such insights can have benefits beyond simply providing context for the provision of legal advice; it can also help shape strategy in ways that better reflect organizational realities.

In a January 29, 2007, article entitled, "Seeing Through Buyers' Eyes," *The Wall Street Journal* reported on efforts to resolve the universal management problem of how to get a handle on customers' needs, beyond surveys and focus groups. In the article, it was reported that General Motors videotaped consumers to study their behaviour and found a hitch in the controls for DVD players in some of its vehicles. The "everyone wears glasses" policy at eyeglasses retailer Meganesuper Co., was a more extreme example, where 2,000 employees literally see through the eyes of their customers. The *WSJ* reported the experience of Yoshihiro Shibata, a manager with 27 pairs of glasses. As Shibata was fitted for glasses, he became more aware of customers' needs in relation to one of the company's most important consumer contact points. He also found that glasses with a certain coating eased headaches from long periods at a computer, and that a special type of lens helped reduce fatigue. "You don't really know that from looking at a catalog," he said.

Six Steps

There are many ways for lawyers to more directly understand their own clients' experiences. Here are six practical examples.

- 1. Get out there.** Rather than dealing mostly with clients by phone and email (often reactively), consider spending six months or so in the offices of your main operational client. This might be in a different city, a different building, or simply a different floor. Either way, it's an ideal way to see how they work, and become part of *their* team as well as your own legal team.
- 2. Go walkabout.** For nearby clients,



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arrange a meeting rather than exchange lengthy emails, drop by their office rather than play phone tag, and for offices further afield, start a regular “lawyer is in” day. Face-to-face meetings quickly get to the core of most issues, and the early identification of others.

3. **Flip burgers.** Step into a front-line role for a week or so. Long enough to experience a critical interface between the client and its customers. After all, *this* is what the organization does, and the better you know how it works, the more effective you will be back at your desk.
4. **Take their pulse.** The sales team is your primary client? The last conference you went to was a legal conference? Make your next one the sales conference; gain a deeper understanding of the key issues that keep your main client awake at night.
5. **Get a handle on what they know.**

Do your eyes glaze over when your finance department client hands over an inch-thick wad of spreadsheets? A quick course on understanding financial statements for non-accountants, or a mini-MBA if you're really keen, will do wonders for your ability to connect with client needs.

6. **Use their language.** In the March 2007, *ACC Docket*, Sean Venden's column, “Mixing Numbers and Lawyers: Accounting as a Second Language” noted that “to better advise your business clients of legal risks, you should speak their language. Your clients don't want to hear legalese. We're relatively certain that they will hear ‘plain English’, but we also know that they will *listen* to the language of business— accounting.” By mentioning during negotiations the impact on operating revenues of a particular clause rather than simply the con-

tract termination risk, Sean changed the context from “legal issues,” and got the support needed for a recommended revision. He understood the client; and they understood him.

There are countless other ways to help develop a deeper understanding of clients' needs; from their perspective, and grounded in their experience. So, break out of your comfort zone: You won't be disappointed. 

Have a comment on this article?
 Email editorinchief@acc.com.

NOTE

1. The joke, source unknown, is an old one, often (as here) modified. The most important change was to place the balloon appropriately for meeting a valued colleague. Above the vineyards of New Zealand's Hawke's Bay seems a mighty fine place. (With thanks to Kevin Smith from hydrographic sciences company HSA Systems: www.hsa.co.nz.)



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