

## Practice Success 101

by Pete Roberts



**E**very matter that you handle has two equal components: legal knowledge and communication. Your legal knowledge and skill brings the matter to a successful conclusion and helps to establish your reputation for competence and professionalism. But, you knew that already! On the communication side I am talking about what to say to the client at the beginning, middle, and end of the matter.

### The Beginning:

This is when you have the client's full attention. "How will we communicate during this matter?" is a good question to ask. Telephone? If so, what is the best number to use? When is the best time to call? Describe what the potential emergencies might be that require the client to reach you as soon as possible. E-mail? Maybe a new e-mail address is necessary for the client because his or her home e-mail is not private. Attachments? OK, but use the Adobe PDF file format and a password to open the attachment. In Adobe Acrobat version 8, open the PDF and choose Ad-

vanced > Security > Show Security Properties > Security Method Drop Down Menu > Choose Password Security. Remind the client that you are not always able to respond to email immediately. Remember to "Under-promise" and "over-deliver." Perhaps you can ask the client to contact your staff person.

### The Middle:

Send copies of all documents to the client during the matter. Stamp them, "For Review, no action required." Call the client and describe the status of the matter, particularly if the file has been dormant. Remind the client to keep you informed of a move to another residence or other changed facts and circumstances. Return telephone calls within 24 hours at the latest.

### The End:

Send a letter to the client at the conclusion of the matter such as this example:

[Date]  
[Name]  
[Address]  
  
Re: [Name of Matter]

Dear \_\_\_\_\_

Thank you for allowing our office to assist you with the referenced matter. Our work is now concluded. If there is any way our service might be improved, please let us know.

We keep your file for [cite file retention policy]. We will contact you to return the file to you. If you notify us that you do not wish to have the file, we will destroy the contents of the file.

We ask that you think of mentioning our office if your friends wish to discuss whether they need legal assistance.

Sincerely,  
[Lawyer Name]

Concluding the matter in a writing helps the client understand that you and the client must reach a separate agreement whether to go forward with any subsequent matter. Understandably, you may be reluctant to ask for information about how to improve your service. Large law firms often poll their clients to find out this information because they know that "perception is reality." It is the client who decides whether she or he is satisfied. If you have this input you are able to make any necessary changes. That is powerful. Not knowing risks an unsatisfied client drifting away from your office and telling others.

If the client has felt well informed and supported by your office, she is likely to refer others to you even if the result was not up to everyone's expectations.

### Other Practice Tips:

Excellent computer search engines include: <http://www.google.com>;

<http://www.alltheweb.com>; <http://www.usa.gov>; a people-finder site for finding people, their relatives, their associates, and property records is <http://www.accurint.com>; and a website that offers sample briefs is <http://www.briefserve.com>.

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