



Happy Clients, Happy Lawyers

Tips for Better Client Relationships





Contents

Editor's Note: Get Happy | 2

It Starts With Trust: How to Form Lasting Relationships That Generate Referrals | 4

By Christina Burns

Communications Checklist: 8 Ways to Enrich Client Relationships | 6

By Danielle Flagg

Happy Clients: Steps Lawyers Can Take to Reduce Their Clients' Stress | 8

By Jamie Spannhake

First Impressions: Ways to Spruce Up Your Firm's Client Intake Process | 11

By Noble McIntyre

Three Things Not to Say on the Phone | 12

By Phoebe Osborn

Technology Tips to Improve Your Firm's Client Communications Strategy | 14

By Jim Calloway

Start Using Video Communication for ... Everything | 17

By Reid Trautz

Must-Have Technology for Better Client Service | 18

Heidi Alexander, Sharon Nelson and John Simek, Courtney Troutman, Tom Lambotte, and Emily Worley

How to Make Clients Happy to Pay Your Bills | 21

By Marilyn Astin Tarlton

Creating a Less Stressful Workplace for Lawyers | 23

By Jamie Spannhake

More Tips for Better Client Relations | 26

Product Spotlight: Stay Connected No Matter Where You Are With Ruby's Mobile App | 28

About Attorney at Work | 29



Get Happy

People who feel “time stress” show signs of lower life satisfaction, including more anxiety, poorer eating and exercise habits, and increased insomnia. That’s no surprise. However, a recent study, “[Buying Time Promotes Happiness](#),” set out to discover whether the “time famine of modern life” can be reduced by using money to buy back some time. Among the findings: People who spent money on “time” were happier than those who spent on “things.” By “paying their way out of unwelcome chores”—for example, hiring a maid service—they freed time for more enjoyable and rewarding activities. The idea is to open your wallet to ditch the negative moments that steal your time and, worse, kill your passion for the things you once enjoyed.

Nobody’s solving the complex happiness issue with a time management hack. Still, a small change or single decision can have a big impact on your outlook and your well-being—whether it is boycotting 24/7 news alerts, paying more for conveniences like closer parking, outsourcing HR (instead of personally refereeing staff squabbles) or even firing an abusive client.

So if you’re feeling the effects of time stress and worry about all the ways it is affecting you and your practice, read on. With the help of Ruby® Receptionists, we’ve gathered good advice on building client relationship skills, improving communications, and using smart tools and systems to create a more efficient and less-stressed law practice:

- Christina Burns offers hands-on tips for boosting the client trust connection.
- Noble McIntyre has simple ways to upgrade your intake process.
- Jamie Spannhake points to ways to calm anxious clients.

- Jim Calloway reviews the latest ways technology helps you communicate more effectively with your clients.
- Marilyn Astin Tarlton shows how to make clients happy to pay your bills.
- And Jamie Spannhake rounds out the guide with tips for creating a less-stressed workplace.

Finding Time for Relationships

In addition to these tips for your practice, consider assessing how you’re spending your time at work and outside the office. Over a week or two, write down everything you do. Be honest: Procrastination or lack of sleep, for example, may signal that something’s amiss. Track your attitude about your activities, too: dread, excitement, boredom? “Buying Time” tells us to examine our lives for ways to trade “negative moments” for more positive ones. What’s setting your teeth on edge? What can you delegate? And, perhaps most importantly, with whom should you spend more time?

Making time for relationships means you are much more likely to be healthy and happy at work and play.

— Joan Feldman (@JoanHFeldman), Editor, Attorney at Work

*For more details on the study, read the Harvard Business Review article, “Want to Be Happier? Spend Some Money on Avoiding Household Chores.”)



Callers will never guess Ruby isn't in your office.

What if you could hire an outstanding receptionist without breaking the bank? Ruby's live receptionists answer your calls in English and Spanish, transfer calls, take messages, collect new client intake, make follow-up calls, and more—just like an in-house receptionist, at a fraction of the cost.



LEARN MORE AT callruby.com/attorneyatwork
OR CALL 855-493-4769





It Starts With Trust: How to Form Lasting Relationships That Generate Referrals

BY CHRISTINA BURNS

According to an American Bar Association poll, 46 percent of consumers will ask a friend, family member or colleague for a referral when looking for a lawyer. Similarly, 65 percent report that reputation, ratings and reviews have a significant influence on their hiring decisions. So a good reputation among existing clients is critical to attracting more clients. But how do you get there?

The secret to turning clients into loyal fans—the kind who consistently refer business your way over and over again—is to create meaningful relationships with them. Here are some practical tips to help you build

trust with clients, generate loyalty and, ultimately, form the kind of lasting relationships that drive word-of-mouth referrals.

Inventory Your Infrastructure of Trust

Take a few moments to consider the fundamentals of your practice and make a list. What do you absolutely need to run your practice and serve your clients at a basic level? Think about the things you do or use every single day and ask: “Could I cut this out and still deliver the service my clients expect?” If it can’t be eliminated, add it to your list. For example, reliable internet, email and phone service are probably must-haves on your list, as is doing a client intake process and so forth. Once you have your list, ask yourself:

- What items on this list can be made easier?
- Which could be automated?

- What are my pain points surrounding these list items, and how might I remedy them?

If, for example, you write a similar email to clients over and over, you can turn it into a template to save time. Also, you might set up auto-pay so that you never get a service lapse in your high-speed internet.

It's so rare that we take the time to inventory our fundamentals, but it's important because the items on your list all play into the trust you're earning with your clients. Before you can build a solid relationship with clients, you first need to consistently deliver the basic service you promise. By streamlining the everyday essentials that keep your practice running, you'll not only reduce your stress (and the stress of your team), but have a service infrastructure that your clients can rely on. You want to make it as easy as possible to do what you say you'll do for your clients, so wherever you can, create systems to ensure consistency.

Fostering Loyalty: Touchpoints

Every client interaction is an opportunity either to deliver on the trust you've built and use that trust to earn loyalty, or to damage that trust and move backward. What are all of your clients' touchpoints? Even seemingly small interactions are moments in time that make an impression in your client's mind. Your hold music, how long your phone rings, the way your assistant gives directions to your office—these can all affect a client's opinion of your practice.

It's time to make another list, one that includes all the client touchpoints you can think of. Once this list is complete, think about the impression you want your clients to have when they interact with your practice. Then, home in on the touchpoints that impact that impression. If you want clients to think of you as highly responsive, for instance, focus on touchpoints that are directly connected to returning calls and emails. Don't be afraid to capitalize on those touchpoints. Once you've identified your most important ones, look for ways to improve them.

Adding little flourishes can go a long way toward building loyalty.

“Every client interaction is an opportunity either to deliver on the trust you’ve built and use that trust to earn loyalty, or to damage that trust and move backward. What are all of your clients’ touchpoints?”

If you know phone calls are one of your major touchpoints, you might send a follow-up email after every client call summarizing what was said. Or maybe you want to send a notecard any time a client mentions a birthday or anniversary. Look for opportunities to add some pizzazz in these interactions—it's where the magic starts to happen.

Forming Real Relationships

Once you've built a solid infrastructure and refined your client touchpoints, take what you've learned in creating all those little connections and use it to create a larger “wow-worthy” experience. Don't be afraid to see your clients as friends at this point: You want to think of them in a relationship-focused way. Ask them questions and find ways to connect on a personal level. Then work those connections back into your touchpoints. Engage with clients, listen for cues and use those cues as opportunities to further build the relationship.

For example, after a friendly conversation that mentions a personal project, you might follow up with a relevant gift: “Good luck with all that yardwork this weekend! Here's a pair of gardening gloves to help get you through it.” Just like that, your client is smiling, truly feeling cared about and connected to your practice in a meaningful way.

The relationships you build with your clients directly impact your success. To create a standout experience that encourages more referrals, nurture the relationship—and start with trust.

Christina Burns (@CXBurns) is VP of Customer Success at Ruby Receptionists.



Communications Checklist: 8 Ways to Enrich Client Relationships

BY DANIELLE FLAGG

Every day offers opportunities to build trust with a client or prospect, thereby setting your firm apart from the competition. Here are eight easy ways to do just that in your communications.

- 1. Make the first call count.** What do prospective clients experience when they phone your firm for the first time? Does the experience differ throughout the business day? If you rely on voice-mail or an automated system to greet callers during typical working hours, expect to lose some prospects. When shopping around for representation, potential clients are likely to keep looking until they're able to connect with a live person. Having a dedicated receptionist or quality remote receptionist service to make good first impressions can work wonders. Talking with a lawyer during an initial call is ideal, but when that's not an option, having a friendly voice to greet prospects, gather intake information, and listen to their story can dissuade them from searching further.
- 2. Aim for attentiveness.** How long do you take to follow up with new and potential clients? An American Bar Association study found that a whopping 42 percent of the time, law firms take three or more days to reply to a voicemail or web-generated form fill from a prospective client. Yikes! Rise above the rest by showing attentiveness. When you can't speak to someone during their initial call, aim to follow up quickly—the same day, if possible. Whatever your typical turnaround time, inform

your phone-answering team so they can keep callers in the know. A timeline can give clients and prospects a sense of security. Waiting for a return call “by 5 p.m. tomorrow” is preferable to waiting for a return call at an indeterminate time.

3. Set reasonable expectations. Do clients know when and how you’ll be communicating with them? Let new clients know what to expect: how often you’ll check in, how easy you’ll be to reach, how quickly you typically return calls, your preferred method of communication (phone, email, text) and the like. The more your clients understand about your process and responsiveness, the better they’ll feel trusting you with their business. And when you need to deviate from a plan—say, if you won’t be able to commit to your usual Tuesday call next week—let clients know as soon as possible.

4. Communicate conscientiously. Are you confident in your interpersonal skills? It’s important for your team to show clients warmth and kindness, but as the attorney, it’s even more important that you do so. Whatever a prospect’s reason for seeking your services, chances are it’s a stressful one, and your bedside manner counts as much as your credentials (or more). Clients aren’t just seeking your counsel—they’re seeking reassurance and understanding. Aim to use reassuring language, and when you have the opportunity to be positive, make the most of it. For example, rather than saying “Sure” or “OK,” show your enthusiasm with “Absolutely!” or “Certainly!” Be liberal with “Thank you,” too. Look for at least one opportunity to express your gratitude in every exchange, even if it’s for something small.

5. Add email follow-ups to your repertoire. Regardless of whether you forgot to mention something or discussed a topic to death, a follow-up email is the perfect complement to a phone conversation or meeting. Use follow-up messages to reiterate key information (“Here’s a link to the website we talked about”), or share additional information (“I thought you might find these resources helpful”). Even when you don’t have anything to add, a quick message to say “Thank you for

taking the time to meet with me!” builds rapport. Two or three lines of type can work wonders.

6. Use templates for common topics. When you find yourself covering the same topics over and over with clients, email templates may be a good solution. If you can set aside time to write a collection of templates, great; if not, just save the next email you write addressing a common topic and tweak it for future recipients. No more time wasted searching for the perfect words to write what you’ve written countless times before!

7. Know when to call. What if a client emails you rather than calls—you should email them back, right? Not always. While it’s pretty safe to assume a client who emails would prefer an email response, sometimes it pays to pick up the phone. If you find yourself fretting over an email reply for an inordinate amount of time, a phone call might be in order. It’s always best to call a client when you need to say “no,” or when the chance of misunderstanding seems high. When you need to be sure your client really gets what you’re trying to convey, a conversation definitely wins out over a complicated message. Nothing beats a friendly voice when the stakes are high.

8. Start a notecard habit. When it comes to bolstering connections with clients, handwritten notecards pack a big punch for a tiny price. Stock your office with notecards, envelopes and stamps, and set notecard goals for yourself and your team. Start small—say, one notecard to a lucky client per week—and work your way up from there as time allows. The key is to set aside time to make it happen. Not sure who to send a note to? Pick a client at random! Even if you don’t know much about the client, an expression of heartfelt gratitude for their business will brighten their day and set you apart from the competition.

Danielle Flagg is a marketing manager at Ruby Receptionists.

Happy Clients: Steps Lawyers Can Take to Reduce Their Clients' Stress

BY JAMIE SPANNHAKE

We cannot alleviate all the stressors felt by our clients in the course of their legal matters, but when lawyers, law firms and clients work together, the stress can be reduced and effectively managed. Here several tactics that firms and lawyers can use to ensure clients are satisfied, informed and less stressed.

Clear communication. The lawyer-client relationship can disintegrate rapidly without effective communication, leading to mistrust and misunderstandings. Lawyers need to remember that clients are people who have legal issues rather than focusing on the legal issues only. You want to address the person, not just the issue. If, for example, you must deliver bad news to a client, remember that it is being delivered to someone who may have a complex emotional reaction to it. Consider the needs of the person when communicating, not just the needs of their business or the effect the issue will have on their legal matter. Be empathetic, give the client time to process the news, and offer a strategy and next steps only when the client is ready to listen.

Proper expectations. Nothing can generate client stress more quickly than unreasonable expectations. Setting proper expectations is a no-brainer in theory, but in practice it can be more difficult. Sometimes lawyers inadvertently give clients the wrong impression about possible outcomes. Or, a lawyer will create a heightened client expectation by touting—with multiple caveats—the best-case scenario for a possible

“Yes, being ‘responsive’ means responding to clients in a timely manner. Email and phone calls should be answered no later than the following day. Sometimes even a quick response to say ‘I received your voicemail and we can talk more tomorrow’ will suffice for the time being.”

outcome. Unfortunately, many clients will only remember the scenario and completely forget the caveats, thereby creating the unreasonable expectation. Ultimately, no matter how great the legal representation, if that “best-case scenario” is not the eventual outcome, disappointment or unhappiness ensues.

Being in the know. Updates are key to most clients. A few clients will assume that all is well unless they hear otherwise. Most clients, however, want to hear from you periodically and will assume nothing is happening if you don’t inform them of progress that’s being made in their matter. Ensure that regular updates go out to clients, even if the update merely states that the matter is currently in a “holding pattern” awaiting certain outcomes before it can proceed further. Knowledge is power and one of the keys to low client stress.

Transparent and timely billing. This is a must for keeping client stress to a minimum. Transparent invoices detail legal services, break down work into understandable and concise blocks, and show all discounts clearly. Clients who can see from the invoice exactly what work was completed will be more likely to understand the fees, believe they are receiving value for their money, and pay without questions or concerns. To create detailed invoices, record time as it is incurred, whether hourly or daily. Keep an ongoing record of time worked to ensure that all

billable time and tasks are captured accurately. Transparency in billing also entails using clear language that clients understand, so use layman’s terms in invoices for easy client comprehension.

Invoices should be sent on a regular periodic basis, usually each month, so the time between work completion and invoicing is short. Plus, invoices for smaller amounts are more likely to be approved and paid than larger ones, so don’t wait until the end of a matter, or even several months, to bill a client. Waiting to bill invites “sticker shock.” Timely and frequent billing also allows clients to budget more effectively internally, which they will greatly appreciate.

Responsiveness, in time and content. Yes, being “responsive” means responding to clients in a timely manner. Email and phone calls should be answered no later than the following day. Sometimes even a quick response to say “I received your voicemail and we can talk more tomorrow” will suffice for the time being. But true responsiveness also means proactively anticipating client needs and understanding how to respond

“Transparent invoices detail legal services, break down work into understandable and concise blocks, and show all discounts clearly. Clients who can see from the invoice exactly what work was completed will be more likely to understand the fees, believe they are receiving value for their money, and pay without questions or concerns. To create detailed invoices, record time as it is incurred, whether hourly or daily.”

in a manner that addresses them. The best way to offer this level of responsiveness is to become intimately familiar with the client's business and understand their expectations regarding modes of communication. For example, does the client want to be cc'd on every small item that's addressed via email, or only to be looped in when an important decision needs to be made? Does the client prefer to be mailed a summary of issues, or to have questions and answers addressed in phone calls? If you are not sure, ask.

Welcoming environment. When clients feel welcomed and comfortable, it can help reduce their anxiety over having to retain a lawyer or pursue a legal matter. So it's important to make the law firm environment welcoming in every client interaction, including exchanges with receptionists, assistants and other staff. Start with your reception area. It should be comfortable and hospitable. Your receptionist should be friendly, attentive and able to attend to the small details. Make sure coffee or water is offered, have candies or snacks available, provide interesting reading materials and have comfortable seating.

Examples of other small ways you can make clients feel welcome: Offer "insider's" directions for the best way to get to your office during rush hour, or places where parking is always easy to find. Or set up a parking validation arrangement with a nearby lot so clients don't have to pay parking fees when visiting your office. This attention to detail can go a long way toward relieving clients of other stressors that can negatively affect the attorney-client relationship.

Non-legal information and assistance. The icing on the cake for client satisfaction is providing other information and assistance in everyday areas related to the firm's focus. For example, a residential real estate firm can provide a list of moving companies, local activities and service providers, or amenities for clients new to a community. A family law practice might offer free in-house childcare to clients during attorney-client meetings. An estate planning practitioner could

recommend accountants to help with tax planning needs related to the client's estate plan.

You can get creative in finding small ways to address the needs of your clients beyond their legal ones.

Jamie Spannhake (@IdealYear) is a lawyer, mediator and certified health coach. She is a partner at Berlandi Nussbaum & Reitzas LLP, serving clients in New York and Connecticut, practicing in the areas of commercial litigation, estate planning, residential and commercial real estate, and business transactions. She writes and speaks on issues of interest to lawyers, including time and stress management, health and wellness, work-life balance and effective legal writing.



WELCOMING CLIENTS

First Impressions: Ways to Spruce Up Your Firm's Client Intake Process

BY NOBLE McINTYRE

Law firms are busy places, and sometimes the smaller operations are even more chaotic than their large firm counterparts. It's important to keep that behind the scenes, though. Your clients should see only a well-oiled machine—beginning the moment they first make contact with the firm.

Often, the first interactions will involve your support staff. Theirs are the first faces a client sees when she walks through the door, the first greetings on the phone, and they are sometimes involved in prescreening, too. So, it's crucial that each of your support team members understands the message you want to send to

the public and conveys it when dealing with clients, whether in person, on the phone or by email.

Client Intake Calls: Getting It Right

Our firm represents clients in personal injury matters. Many prospective clients find us online and make initial contact through our online contact form, but we also have clients who reach out by phone or email. I've written before about general law firm phone etiquette. However, when it comes to intake calls specifically, here are a couple of things to impress on anyone who answers the phones at your office:

Be sensitive to the caller and their reason for contacting you.

The day someone needs to retain legal counsel is probably not that person's best day. In my practice, the person could be calling because he's just been in a car accident, is having medical complications or has lost a loved

one. I remind staff that although they deal with injured clients every day, to the person on the phone this is a huge life event.

Manage expectations. The staff who are on the frontlines of taking phone calls or answering email inquiries need to have a realistic view of the time frame in which you will respond to the client. A prospective client who is told that he will get a return call by the end of the week will often wait for the call during that time frame. If a prospective client is told he'll get a call back by the close of business and the call doesn't come, he will have moved on to another firm by the end of the week.

Who Does Intake Screening in Your Practice?

If you're a solo practitioner with one secretary or receptionist, it's probably you. But if you are in a group with a few lawyers, paralegals and support staff, the prescreen task could go to someone else. If you have a trusted paralegal or support team member who can do a telephone pre-screen, especially when the contact comes from an email or an online form, it can save you a lot of time.

You will want to determine a strict intake protocol. Prepare a list of your standard intake questions and coach the person chosen how to ask them.

Note: The benefit to doing this by phone is that when the client arrives for the first in-person meeting, he can meet directly with the lawyer who will be taking the case. For you, the benefit is that you will have already been briefed as to what the case and client are about before you participate in that first meeting.

Using a Virtual Receptionist for Client Intake Calls

More law firms are embracing the virtual receptionist concept for day-to-day calls and inbound prospective client calls. While these services can definitely be cost-effective, you need to be sure it will be able to deliver the customer service experience that you would want a client to get from a receptionist in your office.

THREE THINGS NOT TO SAY ON THE PHONE

BY PHOEBE OSBORN

Everyone in your firm who fields phone calls is on the frontlines of client service. To help staff members make the right impressions, the Ruby Receptionists team suggests avoiding these phrases.



1 "I CAN'T." You want to help your callers get to where they need to go, and "I can't" is a dead end. Even if you can't do exactly what the caller asks, you can provide some kind of help. Think of what you can do, and offer to do it. Here's a quick example. Caller: "I need to reset my password for accessing the client extranet. Can you help me with that?" Instead of this ...

Receptionist: I can't. I'll connect you with our tech support department.

... get rid of "I can't" and move on to the good stuff!

Receptionist: Let me put you in touch with our tech support department. They'll be happy to help you with that.



2 "I DON'T KNOW." You may not have the answer to your caller's question, but saying "I don't know" gets you nowhere. Bypass "I don't know" and move on to the next part: putting the caller in touch with someone who does know.

"That's a good question. Let me find the best person to answer it."

It can be difficult or even embarrassing to ask for help. Your callers will feel better about themselves if you acknowledge their question and find the best person to answer it. If there's no one in the office who has the answer at the moment, let the caller know that you'll find out how to help them and call them back when you can. Then follow through!



3 "HOLD, PLEASE." Sure, you need to place callers on hold from time to time, but it's best to ask permission first. Rather than "Hold, please," go with "May I place you on hold for a moment?" Our live virtual receptionist team always asks first, and when a caller declines to be placed on hold, we don't press the Hold key. Take a message if need be and call them back—they'll appreciate your attentiveness and manners.

Phoebe Osborn is writer for Ruby Receptionists.

There are lots of variations in how to employ a virtual receptionist service, including what level of live or automated phone answering you wish to use. It could involve an automated menu-based system that transfers calls based on the caller's input prompts, but there can also be live operators to interact with callers.

Lawyer-Client Communications: Setting Expectations

As we talk about “prescreening” and “intake,” what does that mean, exactly? While each firm and lawyer might handle the client onboarding process differently, certain components of the process should be consistent. The two main aspects of client intake involve the client's communication with you (the nature of their case, what their desired outcome is) and your communication with the client. What do you need to communicate to the client during those initial interactions?

1. Your firm's general business and legal philosophy
2. How, when and how much the client will be billed, including a clear explanation of your fee structure
3. Expectations for the attorney-client relationship
4. An ongoing communications structure

It is especially important to set expectations for ongoing communication. If you generally communicate by email versus by telephone, the client should know that. If the client is averse to email, explain what your usual time frame is for returning calls. It's always better to prepare a client up-front for what to expect. Also, let prospective clients know when they will be dealing with you directly and when a paralegal, associate or support team member will be handling certain aspects of the case.

The key to client intake is having a streamlined process that allows you to efficiently screen to make sure that the cases are within your area of practice, and that there is potential for a good working relationship between you and the client. Whether you win or lose the case, the ongoing objective is to manage your client's expectations and nurture the attorney-client relationship.

When clients understand up-front what is expected of them and what they can expect from you, you can move forward effectively.

Noble McIntyre (@NobleMcIntyre) is the senior partner and owner of McIntyre Law. He focuses mainly on drug litigation and catastrophic injury cases, and his firm handles a range of personal injury matters. You can contact him at www.oklahoma-law.com.

PRODUCT SPOTLIGHT

RUBY INTEGRATIONS STREAMLINE WORKFLOW AND BILLING

More than 40 percent of Ruby customers are lawyers, and that's one of the big reasons we've partnered with three trusted resources for attorneys: Clio, Rocket Matter and Lexicata.

By integrating our call data with the tools our customers use daily, we help ensure that no matter where they go, our customers have everything they need to run their practices efficiently.

- Ruby and Rocket Matter's cloud-based practice management software work together to streamline workflow, automatically syncing calls, voicemails and messages with your Rocket Matter account. Plus, our call data includes the date and length of every call for easy, accurate billing.
- Similarly, Ruby pairs with Clio's cloud-based practice management software to easily associate client communications with specific contacts and matters and make billing a breeze.
- And Ruby works with Lexicata's all-in-one CRM and client intake solution to make client intake even quicker, track marketing efforts and more.

These integrations are part of our ongoing effort to deliver unparalleled service that helps our customers thrive, and we look forward to integrating with more innovative tools in the future to serve both our attorney customers and all our small business customers.

To learn more, visit www.callruby.com.

Technology Tips to Improve Your Firm's Client Communications Strategy

BY JIM CALLOWAY

Margaret Atwood, author of "The Handmaid's Tale," has frequently noted that with all technology, there is a good side, a bad side and a stupid side that you weren't expecting. With major advances in technology, like the internet itself, it is easy to think of examples of all three. Of course, since digital communication tools permeate the world and the workplace today, it's almost unavoidable that lawyers' business communications with clients are largely done via technology. So it is a useful oversimplification to state that law firms should design an overall client communications strategy of

minimizing the bad, enhancing the good and avoiding the stupid. This requires thoughtful planning that must be done expeditiously and reviewed regularly because technology will continue to evolve. Here are some ideas to consider in your planning at this point.

First, Recognize the Limitations of Email

Technology distances us from one another even as it connects us. The ability to instantly communicate is sometimes beneficial, but often creates its own stresses and clouded expectations. Email is helpful when a digital record is needed. It allows busy people to communicate without having to schedule a discussion. But those benefits may be dwarfed by the challenges presented by email, the volume of email and flood of information it contains, and the security threats posed by emails.

If we only had to read or delete all the emails we receive, the task might be manageable. But many emails contain a question, an assignment or some other content requiring a response.

Email is more remote and distant than phone conversations or in-person meetings. It is good for sterile and complex information or sending a file attachment, but poor for establishing or building trust and relationships. None of us really enjoys dealing with inboxes, so when we communicate with email we may find the recipient begins from a place of haste, inattention and even negativity. Email is not going to vanish from business communications any time soon. But recognizing and avoiding its limitations will yield benefits.

Scheduling Meetings? There's an App for That

Now, let's address one "stupid" use of email. Never send an email trying to schedule a meeting with three or more people. Someone will fail to reply. Someone will respond on another topic. Soon you may have invested a half hour just trying to schedule a meeting or conference call. This is frustrating for you—and for clients as well. When you are scheduling an appointment with busy people, whether they are lawyers or client representatives, you want to use a scheduling app. Some of these may be built into a practice management system portal, but there are a number of free or modestly priced apps to handle the task. Some options are Doodle, WhenIsGood, NeedToMeet and Timebridge.

Some scheduling apps integrate with Google, Microsoft Outlook or Office 365 to automatically look for "open" times in the participants' calendars. I prefer proposing several options of my own and sending those off for responses.

And soon you may be assisted in scheduling by artificially intelligent chatbots (if you aren't already). You just copy your chatbot on the email discussing the need to schedule a meeting and the chatbot will handle all the back-and-forth via email, checking in with you as needed, until an agreeable appointment time is reached. Several companies now offer this service.

Put a Face to the Voice

Today's technology allows you to see your kids, loved ones and friends as you talk with video-calling tools from FaceTime to Skype. It's pleasing to see them, and helps maintain relationships. As lawyers spend a lot of time negotiating and talking on the phone, wouldn't we be better off having those conversations with clients using videoconferencing tools? Your business clients already routinely do it with others. If a client who owns a smaller business doesn't know how to do that, a law firm might create astonishing goodwill by sending a techie over to install and do brief training on a law firm-supplied webcam.

A young woman recently mentioned to me how she had looked forward to an online meeting about a milestone reached on a big project. When everyone logged in, she was the only one using her webcam. That's not a comfortable situation, and when she made a remark about it, the lawyers who logged in quickly volunteered that they either didn't have webcams or didn't know how to use them. It is the 21st century. Being cluelessly out of touch with commonplace tools is not a good way to inspire client confidence.

Embrace the Client Portal

A client portal is an essential for good client service and communication. At a minimum, you want one because your firm needs a secure method for confidential client communication and document sharing. Email isn't it. Several types of online document repositories and deal-rooms have been established.

Law firms with IT staff can build their own client repositories or vet providers that can build tailored solutions. Solo and small firm lawyers can subscribe to online practice management tools that organize their client matters and provide client portals at a very affordable price.

An assistant general counsel on a road trip may appreciate logging into the law firm's client portal to review documents far more easily than she can log into her own company's records. An individual client who might have trouble dealing with encrypted email will like being

able to easily log into a website with a user name and password. But the law firm portals of today may seem primitive compared to those in the near future. Imagine a practice group that hosts numerous “For client eyes only” resources as a free “value-add” behind the portal login. Or what about legal chatbots operating behind the portal assisting clients in ways besides appointment scheduling.

For consumer clients, imagine a wealth of information not just about their ongoing matter, but covering dozens of frequently asked questions that consumers have about legal issues. One might explain notarization, for example, and note that clients with active matters can have free notarization service through the firm.

A law firm representing individuals might expand that concept with clients paying a modest annual fee for accessing the rich resources of the law firm portal. Portal-based services could range from attorneys responding to a number of routine questions to clients drafting routine documents that would be reviewed by law firm personnel. If a satisfied former client has been visiting the law firm portal regularly, that firm certainly has an inside track if more legal services are needed in the future.

Consider Videos Emerging as Client Services

It's not uncommon for lawyers to develop white papers for clients, but even using the term “white paper” is dated in some ways. While there are certain topics that must be covered in a lengthy written narrative, many topics could be covered with a quickly created video. The next time you are tempted to type out a 12-paragraph explanation to a coworker, take a few notes, turn on your webcam and record a quick video instead. You may find it takes far less time and is appreciated more. Then go ahead and try a brief, simple video on a topic of interest to a client group. Dozens of law firm videos for clients on the firm website or behind the client portal firewall would be impressive—although you'll want an administrative mechanism to make certain outdated videos are removed or rerecorded with updates.

Email newsletters to clients are often deleted unread. An email with a subject line of “5 New Free Videos for You on KZ Law Portal” does its job in the subject line.

Top Tip: What Does the Client Want?

Many times we are forced to use electronic communications to interact with clients. Despite the frustrations of email and other digital communications, they do have the advantage of providing a more accurate record than attempting to recall an oral conversation.

But many people dislike technology or aren't adept at using certain tools. You should always ask new clients about their communication style and preferences. Some may have strong preferences that they might not mention unless you ask. If an otherwise tech-savvy client confides that he has trouble keeping up with his email, a friendly “Can I text you when important items are uploaded to the portal so you won't miss them?” might be seen as very helpful. Some clients really may prefer that they receive traditional correspondence via the U.S. mail. Let them know that is an option, but also communicate that you may need to place more telephone calls to them if things start moving quickly.

Be Sticky

Great legal services are still required for success. But increasingly, great client service and communication are what really increase satisfaction and prompt clients to return to the firm for more legal services. In website design it's called being “sticky” when visitors linger longer and return in the future. People appreciate added value. It could be something as simple as emailing your estate planning clients a PDF form-fillable document to prepare and update an inventory of their assets to be kept with their will. Also, client communication is critical, and billable. Great value-added resources behind the portal firewall can provide extra value to clients without dipping into the firm's important inventory, attorney time, every time that value is delivered.

When representation ceases, the message you want to deliver is “we are waiting for the next opportunity to help you”—not “we have been paid and are done with you.”

Jim Calloway (@JimCalloway) is Director of the Management Assistance Program for the Oklahoma Bar Association and is the author of several ABA books. He blogs at Jim Calloway's Law Practice Tips and co-produces the podcast The Digital Edge: Lawyers and Technology.

Start Using Video Communication For ... Everything

BY REID TRAUTZ

Video communication is an inexpensive yet powerful tool that can help establish and maintain excellent client relationships. The vastly improved quality, ease of use and low cost has propelled this technology to the forefront of many small businesses, including law firms. Such communication includes not only scheduled conference calls, but also many routine calls that now take place on the telephone.

Social scientists have known for years that face-to-face communication where both sound and visual queues are used is the most beneficial form of communication—better than telephone calls and far better than email or written correspondence. Video calls allow us to see reactions to our spoken words. We look for facial expressions, gestures, head movements, and body positioning and shifting. We can see whether the other participants are paying attention or are distracted. We look for visual cues such as head nods and eye contact to see if our message is getting through, being rejected or being ignored.

Better communication leads to better understanding and fewer misunderstandings. That leads to better working relationships. Having positive working relationships with clients, coworkers and co-counsel is a hallmark of excellent lawyering.

Video technology is not complicated. Over 80 percent of American adults now own a smartphone with a video camera. Many use it to talk to friends and family, so why not their lawyer? Video calls are easily made from a lawyer's office. Most laptop computers have built-in cameras, and HD-quality video cameras for office use cost \$50 to \$100 and are easy to install.

- Microsoft Office 365 for Business Professionals includes Skype for Business that can call clients and others from Outlook with just one click.
- Zoom.us is another simple yet robust video communication tool that costs less than \$150 per year for unlimited calls up to 50 participants per call.
- Go2Meeting and Cisco Spark are also popular in this market segment.

Introduce each client to your video communication efforts during the initial consultation. Let them know the benefits and that they can easily communicate with you using their smartphone, tablet, laptop or desktop computer. Consider adding a brief provision to your representation agreement, highlighting the understanding with each client to try to use this technology rather than the telephone or in-person meetings. Make a note in each client's contact information which tools they have to communicate via video.

It may seem weird not to pick up the telephone, but soon your clients will be thanking you, and you'll be thankful you read this tip!

Reid F. Trautz (@RTrautz) is Director of the Practice & Professionalism Center of the American Immigration Lawyers Association and a blogger on the issues of business process improvement, technology, legal ethics and effective practice management. Reid is co-author of the ABA's "The Busy Lawyer's Guide to Success: Essential Tips to Power Your Practice" and a past ABA TECHSHOW chair.



ASK THE EXPERTS

Must-Have Technology for Better Client Service

The lack of basic technology where it's expected can be extremely frustrating. But forcing technology on clients without a human touch can backfire, too. We asked law practice technology pros about the technology lawyers absolutely should use to improve client service—and their best tip for keeping it human.

HEIDI ALEXANDER
**USE E-SIGNATURE AND
ELECTRONIC BILLING**

E-signature is here to stay. There is absolutely no need to 1) attach a document to an email, forcing your client to 2) download it, 3) print it, 4) sign it, 5) re-scan it, and 6) email it back to the sender. Instead, use an e-signature service that allows parties to sign documents and authenticate the signer. You simply 1) upload your document for signing to the e-signature platform, 2) enter the recipient's email address, and 3) the recipient signs the document electronically and receives a copy to download for their records. You've cut the number of steps in half, saving both you and your client time, money and stress.

A few popular e-signature providers include:

- DocuSign
- EchoSign (Adobe)
- HelloSign
- RightSignature

Paper billing is dead. It's time to move to electronic invoices and payments to streamline invoicing and payment on both sides of the transaction—and improve collection rates. Many case management programs can generate invoices to email to clients. Clients can then pay online with a credit card or e-check from any device. That's it. On the law firm side, the payment is applied to the trust or operating account and then recorded in a ledger. Now you've not only made your client happy with the ease of the process, but you've eliminated waste from your own processes. To name just a few, Rocket Matter, Clio, MyCase, Zola Suite, CosmoLex and Leap all offer electronic billing and payments (many through integration with LawPay).

Heidi S. Alexander (@heidialexander) is Deputy Director of Lawyers Concerned for Lawyers, where she also leads the Massachusetts Law Office Management Assistance Program (LOMAP). She is the author of "Evernote as a Law Practice Tool" and serves on the ABA TECHSHOW Planning Board. In 2017, Heidi was appointed to the Massachusetts Supreme Judicial Court's Standing Advisory Committee on Professionalism.

SHARON NELSON AND JOHN SIMEK

ADD 'CONTACT US' FORMS ON YOUR WEBSITE

Email contact forms on your website are indispensable. We are contacted multiple times a day via our contact form by folks looking for our services or to engage us as speakers. We get multiple contacts from that form (which is on virtually every page of our website). Let them tell you in free text what they want. The secrets of success:

- Make sure your website is search engine optimized.
- Get the word out on social media leading folks to your site.
- Make sure you have as many inbound quality links as possible.
- Make sure you are listed in local directories and that you are using Google My Business.
- To avoid spam and bots, use Google reCAPTCHA.
- Make sure all website inquiries are addressed promptly, and are answered by the right people.

- And, to make it human, get them on the phone as soon as it's practical.

It goes without saying that there should be a "phone first" option, so guests don't have to use the form — but we have found that the form is quite a popular method of reaching out.

Over the years, our website "How May We Help You?" contact box has brought in many hundreds of clients — and a lot of invitations to speak at conferences, which in and of itself is a huge source of new clients. Of all the inexpensive things we've done to bring in new clients, this has probably been the most successful!

Sharon D. Nelson (@SharonNelsonEsq) and John W. Simek (@SenseiEnt) are President and Vice President of Sensei Enterprises, Inc., a digital forensics, legal technology and information security firm based in Fairfax, Va. They have written several books, including "The Solo and Small Firm Legal Technology Guides" and "Encryption Made Simple for Lawyers." Sharon blogs at Ride the Lightning and together they co-host the Digital Detectives podcast.

COURTNEY TROUTMAN

WHOSE CALL ARE YOU MISSING?

The first thing anyone notices when they call your office phone is whether they get a recording or they get a human—especially one who knows what is going on.

If you can't afford a receptionist, consider one of the many companies now offering virtual receptionist services. Better than a regular answering service (which, let's face it, tends to be a bit impersonal and hurried), these services have more facts about your firm at their disposal, including your schedule. They tend to be friendlier and more professional sounding, and they can respond quickly to questions—impressing callers who may not even guess they aren't sitting at a desk in your office. Check with your bar association to see if any virtual receptionists offer member discounts.

And if you happen to answer the phone or check messages yourself, don't just scribble the information on the first piece of paper you see. Buy an old-fashioned spiral-bound phone message book with carbons. They're inexpensive and available online and at your local office supply

store. Save these message books (the carbon stays behind after you rip off the top copy) because you may need to refer to it later.

Courtney Troutman (@SCBar_PMAP) is Director of the South Carolina Bar Practice Management Assistance Program, which she founded in 2002. A former practicing attorney, she is a frequent author on technology topics, including numerous articles for ABA publications. She is a Fellow of the College of Law Practice Management and a recipient of the 2014 Fastcase 50 Award.

TOM LAMBOTTE

TWO WAYS TO ENSURE CLEAR COMMUNICATIONS

Email and texting are extremely convenient but are the least efficient method of communicating. You lose so much of the human touch and it leads to a tremendous amount of wasted energy and bad customer service experiences. So many so-called issues are immediately diffused when someone calls to reach out to the client.

My first-level tip to improve client service is to pick up the phone. Old technology, but compared with the 7 percent of communication you get with content (email or text) only, you add on 35 percent for vocal tone for a total of 42 percent communication (a full six times better than email or text only)!

My second-level tip is to use video. Our favorite videoconferencing tool is Zoom. It works with all major devices, and is easy to use and very reliable. One could argue you don't see the full body language via video, but getting the facial expressions and some body language is another big jump in the quality of your communication.

The key with videoconferencing is to use it at the right times. You're not going to force people to use it when they have a quick question. However, it is extremely handy for remote depositions, meetings with clients, co-counsel or opposing counsel, remote testimonies, virtual mediations, and administrative and internal meetings, just to name a few.

Tom Lambotte (@LegalMacIT) is CEO of GlobalMacIT, a company specializing in providing IT support to Mac-based law firms. Tom is the author of "Hassle Free Mac IT Support for Law Firms" and "Legal Boost: Big Profits Through an IT Transformation."

EMILY WORLEY

WOULD A CLIENT HIRE YOU BASED ON YOUR WEBSITE?

All lawyers know (or should) that their website must comply with their state's ethics rules. But would a client hire you based on your website? How many times have you searched for a plumber, doctor, electrician, pet sitter or handy man only to find that: (1) they don't have a website, (2) their website is out of date, or (3) their website is too complicated? What happens? You are either extremely frustrated or find someone else because you assume the business is not respectable or competent.

Every law firm should have a working, responsive and modern-looking website. Ideally, it should be easy to navigate and branded to match your law firm's identity and logo. How can you improve your website? First, think about all the things that annoy you when you visit someone else's website. Do you get a lot of pop-up ads or chat windows? Is the design boring or misleading? Is the content helpful? How quickly did you find what you were looking for? How did it make you feel? Next, think about all your positive website experiences. What did you like about those websites? Were they easy to navigate? Easy to understand? Appealing? Or something else?

Make a list of the URLs and features of your favorite websites versus the bad ones. (You'll need this list later when you hire someone to assist you in designing or updating your site.) Now, compare your website to the ones on your list. How does your website measure up? If you're not sure, send the link to a couple of acquaintances and ask for honest feedback.

Extra: Read "[Law Firm Website Trends to Watch](#)" on [AttorneyatWork.com](#).

Emily Worley (@pmatechie) is the PMAP Assistant to the South Carolina Bar Practice Management Assistance Program, where she assists the PMAP director in providing practice management and technology assistance to South Carolina Bar members.

Six Ways to Make Clients Happy to Pay Your Bills

BY MERRILYN ASTIN TARLTON

No one likes to pay bills. Even when the service or product we are paying for was way more valuable than the actual dollar amount on the invoice, we humans just hate to see the money out the door. And that natural resistance to doling out the bucks can often leave a lawyer looking at high accounts receivable and collections tasks galore.

Why not implement a few changes to help clients feel more positively disposed (dare I say enthusiastic) to pay promptly next month? These six things will help.

1. Greet them as a friend. Not only is it easier to pay someone you like, it is harder to stiff that person. Make a point of treating your clients as trusted and loyal friends. Use first names, express enthusiasm to see them, know about their business and their family, remember birthdays, understand what's going on in their lives and refer to it, demonstrate that you are sitting on their side of the table. This will make doing business with you more pleasant (and improve your own experience of the time you spend in the office). Remember, too, that your client deals with others in your office, not just you. Model the way to make sure *everyone* forms good relationships with all client representatives.

2. Keep them informed. You may think it is your responsibility to do the job and tell the client about it afterward. And you may be right; that is what some clients want from you. Others want to know what's going on when it is going on. Ask how they want to be updated, and make sure you

“Sure, winning the big case always makes clients happier to pay the bill. But even when it’s not a big win, the way you handle yourself and their interests demonstrates that you are doing everything you can to help them resolve a conflict or strike an agreement.”

give them what they want. This also applies to how you describe the work on your bills. I guarantee no one really wants to pay for an hour of your time, but if you can describe well what you did in that hour — and couch it in terms that show the value of the activity to them — clients will know more clearly why it makes good sense to pay you for it.

3. Go the extra mile. Demonstrate that a client’s relationship with you is worth more than the legal work you perform. Make introductions to people who may be useful in their business or private life. Offer to co-write an article for publication about something significant you helped them do. Ask them to serve on a panel discussion with you to illustrate a new legal strategy. (Yes, this benefits you, too. Isn’t that nice?)

4. Please them with the work. Sure, winning the big case always makes clients happier to pay the bill. But even when it’s not a big win, the way you handle yourself and their interests demonstrates that you are doing everything you can to help them resolve a conflict or strike an agreement. And it shouldn’t go without saying: Don’t take their emotional responses to developments lightly. Do listen well and feed back what you hear to assure them they are heard. Don’t take shortcuts. Do proofread to avoid misspellings and other errors.

5. Make the bill simple to understand. While we’re on the subject of proofreading, please avoid legalese and financial gobbledygook in drafting your bills. Speak and write clearly. If the system you use

doesn’t allow text descriptions on the actual invoice, write a cover letter or memo to clearly restate the charges and any necessary explanation.

6. Always say thank you. There are a lot of lawyers out there looking for work—looking for good clients. Make sure your clients know that you are grateful for their business and pleased by their trust and loyalty. Thank them whenever you meet and whenever you write. Send a gift to honor business anniversaries or family birthdays, or just because. Make them feel important and appreciated. It will make it so much easier for them to pay your bill.

Merrilyn Astin Tarlton (@AstinTarlton) is the author of “[Getting Clients: For Lawyers Starting Out or Starting Over](#).” She is a founding member of the Legal Marketing Association (LMA), an LMA Hall of Fame inductee, a past President of the College of Law Practice Management, and a founding partner of Attorney at Work.

Creating a Less Stressful Workplace for Lawyers

BY JAMIE SPANNHAKE

The legal landscape is stressful. Lawyers know it, and leaders at law firms know it. Lawyers face client demands that are sometimes around the clock. The issues and consequences lawyers and their clients face are real. The stakes are high, and deadlines are always looming.

That level of stress has consequences. Stress is a natural physical and mental reaction to life experiences. It can be beneficial on occasion. But chronic stress—the body being in a constant state of high stress—is problematic.

The body's stress response releases hormones that increase heart and breathing rates and ready muscles to respond. When stress levels stay elevated for long periods of time, it takes a significant toll on health. Chronic stress can cause headaches, depression, rapid breathing, insomnia, a weakened immune system, heartburn, high blood sugar, risk of heart attack, high blood pressure, stomachache, fertility problems, sexual dysfunction, and tense, aching muscles.

Many law firms are taking steps to address chronic stress in lawyers, aiming to ensure healthier lawyers who can provide better service to clients. The end result is a more successful law firm, with higher lawyer and client retention rates.

Steps Firms Can Take to Reduce Stress

Judi Cohen, the founder of Warrior One, a mindfulness program for lawyers, describes the four “big difficulties” of the law as:

- The enormous volume of work
- The need to always spot the issues and look for what’s wrong
- The lawyer’s right-or-wrong mentality
- Constant conflict

Similarly, Jeena Cho, author of “The Anxious Lawyer,” says: “Let’s face it, rarely do clients come to visit a lawyer with happy news.” Unfortunately, lawyers rarely receive any training or guidance on how to handle these stressful impacts of their work environment.

Fortunately, there are people developing health and wellness programs to help lawyers reduce stress and anxiety, improve their cognition and attain tools to survive—even thrive—in the practice of law: people like Cho, who is a lawyer and mindfulness coach; Cohen, who is one of the top mindfulness teachers in the legal profession; Susan Manch, Chief Talent Office at Winston & Strawn LLP and former Chief of People and Development at Norton Rose Fulbright LLP; and Tal Fagin, a leading life coach who works with lawyers.

Recognizing the Benefits

Why should firms invest time and money in programs designed to help their lawyers reduce stress? Because it’s a win-win solution. Wellness programs can result in healthier and happier employees who are more effective and productive, and can improve a firm’s retention rate by reducing burnout and increasing job satisfaction.

There are also financial benefits to the firm. Wellness programs can reduce a firm’s health insurance costs, in particular when the program is based on a health insurance review of persistent health issues within the firm. This allows a firm to identify problems that can be remedied through the wellness program, such as creating better habits like eating

healthfully and managing stress. The health insurance provider can also help identify the programs that will give the “biggest bang for the buck” based on their experience over time. For example, with knowledge of how many employees are taking a certain drug or showing signs of certain ailments, firms can tailor their wellness programs to specifically address more of their employees’ health issues.

Creating a Culture of Wellness

Here are some of the key elements for law firms to consider.

Encouraging a healthy lifestyle. At Norton Rose Fulbright, Manch worked with the firm’s benefits group to develop a firmwide program to encourage awareness, education and conversation about health and wellness. The firm’s wellness program featured a theme for each month with at least one educational program and a related special event. For example, one month was “Commit to Be Fit,” with an educational program on healthy eating and physical activity, followed by an eight-week fitness challenge. Lunch-and-learn programs conducted by health and wellness professionals have been held on topics such as nutrition, mindfulness, financial wellness, heart healthy habits, fitness, smoking cessation and starting an exercise program.

Another effective piece of a wellness culture is to provide healthy food at firm events and healthy snack alternatives in the office pantry: fresh fruit and nuts, organic coffees and teas along with bottled water and seltzer instead of sodas. When lawyers get busy and reach for a snack to get through a crunch time, having a healthy alternative to the vending machine can make a big difference.

Providing flexible arrangements. Also integral to a wellness culture is recognizing the importance of flexible work arrangements and allowing lawyers time for personal support and self-care. Smart firm leaders realize that working with great people is not only about working with smart legal minds, but also about supporting whole, balanced people who have other interests and obligations, like family, pets, charitable activities and hobbies.

Many firms are saying goodbye to daily “face-time requirements” in their offices, unless there is a specific need to be on-site. This kind of flexibility about location allows a lawyer to work from a home office or other place to more effectively balance work hours and personal matters. The arrangement may include compressing required in-person attendance to just monthly meetings, where every team member is expected to attend. This ensures the opportunity to interact with colleagues and discuss relevant issues and matters on a set basis.

Firms are also offering flexible working hours, so the start or end of the workday needn’t fall in the typical time frame. Under many of these flex-time arrangements, it matters little when in the day (or night, as the case may be) the work gets done, so long as the outcome is the same: hours worked and billed, deadlines met, new matters started, ongoing matters managed and so on. But the personal outcome is much better. Flexible work hours can include, for example, working at home after the kids are in bed or coming to the office early in the morning in order to leave mid-afternoon to fulfill personal commitments.

To further promote self-care and help lawyers handle the stress of balancing law and life, some firms are also offering—and footing the bill for—other kinds of support, such as life and career coaches, psychological support and counseling, and prorated gym memberships.

Incorporating mindfulness techniques. Some firms offer mindfulness training and meditation. Mindfulness means being present in the moment and focusing on what is happening right now. The opposite would be distractedness—for example, while at work, focusing on all the things that need to be done at home. Meditation can be used to develop and practice mindfulness, and is described in many ways, including a state of consciousness when the mind is free of scattered thoughts. Mindfulness and meditation are scientifically proven to help with the stressors inherent in the practice of law, creating calm and focusing the mind. Lawyers can thereby better manage their emotions, connect with others more successfully, and become more satisfied and effective in their work. Essentially, mindfulness and meditation allow the lawyer

to remain calm in the midst of the storm without letting the anxiety overwhelm and cause burnout.

Other opportunities to improve. Firms are also offering healthy competitions to inspire their employees to get fit and be well. Examples include step challenges with step trackers provided to all employees, weight-loss challenges with weekly weigh-ins, and teams for bike races and runs. Some firms are incorporating health and wellness into their annual charity events by choosing active participation programs like Habitat for Humanity, where employees work to construct homes. One firm even set up blood pressure monitors in-house for employee use.

A new benefit: insurance coverage for alternative medicine. “Alternative medicine,” also called integrative or complementary medicine, describes medical treatments that are used instead of traditional or mainstream therapies. Examples include acupuncture, massage, homeopathy, herbal medicine, chiropractic, reiki (an energy therapy) and talk therapy. Many of these therapies are aimed at helping the body heal itself and are preventive in nature to help manage or prevent stress. Law firms, like the medical profession, are beginning to recognize the effectiveness of these treatments to keep disease at bay and are offering insurance plans that cover alternative medicine.

Jamie Spannhake (@IdealYear) is a lawyer, mediator and certified health coach. She is a partner at Berlandi Nussbaum & Reitzas LLP, serving clients in New York and Connecticut, practicing in the areas of commercial litigation, estate planning, residential and commercial real estate, and business transactions. She writes and speaks on issues of interest to lawyers, including time and stress management, health and wellness, work-life balance and effective legal writing.

More Tips for Better Client Relations

From the Attorney at Work archives, here are links to some of our most popular posts on satisfying client relationships.

- [Five questions to ask at your first client meeting.](#) It's less about you knowing all the answers and more about you knowing the right questions to ask. Case in point: your first meeting with a new client. It should be your No. 1 priority to launch a long, productive relationship by learning all you can up-front. By asking good questions, you will build trust, manage expectations and clearly define the work to be done. — *Merrilyn Astin Tarlton*
- [Mind the gap.](#) The language we speak is full of specialized terms. The documents we create are highly unfriendly. The systems we work in are bewildering. Most people have little idea what to expect when they hire a lawyer, except that whatever happens will probably be confusing and expensive. It's little wonder, then, that clients are anxious when they walk through your office door. You can't avoid it at the start of your relationship, but you can alleviate confusion and anxiety if you do two things: Put yourself in their shoes and do all you can to act as their interpreter; and bridge the gap between the legal world and theirs. — *Mary Lokensgard*
- [How to calm an angry client.](#) People feel out of control and a little unsafe in mid-tantrum. If you can maintain your calm, control the situation and guide both of you to a good solution, your client will relax. Here are the basic steps to take. — *Merrilyn Astin Tarlton*
- [De-escalate a tense situation—fast.](#) Try this technique for calming an angry client in 90 seconds or less. — *Doug Noll*
- [Being clear isn't just about "dialing down."](#) Trouble trying to communicate complicated stuff? As much as you can, try to illustrate what you mean using examples that involve real people in real life situations. — *Christopher Graham*
- [Expect complaints.](#) While it may not feel like it, a client who complains is a good thing. It not only gives you a chance to fix the issue, it can actually build loyalty by demonstrating your commitment. How you handle the problem can be a defining moment in your client relationship. Try these tips for dealing with someone who is upset. — *Sally Schmidt*
- [Track your own performance metrics.](#) Your clients are auditing your performance based on the criteria important to them. Do you know what they are? Here is a simple way to track your cycle times, budget, settlement and verdict evaluations, and compliance with reporting deadlines. — *Jeremy Richter*
- [Three service tenets for satisfied clients.](#) Unhappy clients often choose to file ethics complaints against their poor-performing lawyers. What leads to their unhappiness? Most ethics complaints are not about incompetence. Instead, most complaints revolve around basic customer service expectations. They involve issues that, even without specific ethics rules in place, would make any reasonable person agree the lawyer should be disciplined. — *Roy S. Ginsburg*
- [What to ask in client service interviews.](#) For some clients, the only question you may need to ask is: How could our service to you improve? For others, simply providing an opportunity to expound on that one question may not be enough. You have to ask a series of questions to draw them out. Here's a road map to the types of questions you'll want your clients to answer. — *Linda Hazelton*

- **Fire a client.** Regularly taking the time to focus on client selection—and deselection—should be part of every lawyer’s discipline. — *Simon Chester*
- **All business isn’t good business.** Here’s how to recognize toxic clients and find the words you’ll need to purge them from your practice. — *Mike O’Horo*
- **Send a letter of closure for the right reasons.** I can understand why some might view these letters as more of a goodbye, get-out-of-here statement and so don’t wish to use them. However, I see these letters as powerful marketing tools. Regardless of whether the client is an in-and-out or a long-term one, the client has honored you by entrusting you with its current legal matter. Why not acknowledge that and say thanks? — *Mark Bassingthwaite*
- **Beware the ongoing, but never consummated relationship.** Unfortunately, if we’re not hired after the initial discussion with a potential client, most of us move on with our business and don’t give them another thought. Before you move on next time, think about sending out a non-engagement letter. These non-clients can come back and bite you if you’re not careful. — *Megan Zavieh*
- **What to do when you lose a client.** It happens to every lawyer. A good, longtime client suddenly drops the relationship and seeks counsel elsewhere. Or, perhaps you compete for a new client and you’re not selected. It can happen for any number of reasons. Many of them are things over which you have control. Some of them are not. While it’s tempting to heave a pathetic sigh and just turn the other cheek, your job isn’t really done here until you check off a few things. — *Merrilyn Astin Tarlton*
- **Referral madness: stay on top of staying in touch.** Your existing clients will only remain good referral sources if you determine to stay in contact with them, making your desire for receiving their referrals known. — *Jared Correia*
- **Make your law firm easier to contact.** If you make it easier for people to reach you using their preferred method, you’re going to get more contacts — ones that could convert to clients. Today, this is especially true of your website. While phone calls have always had the highest conversion rate, from the initial contact to case sign-ups, technology is rapidly evolving and offers more ways than ever for people to contact you. — *Casey Meraz*
- **“Answer by the third ring” and other telephone etiquette best practices.** Until new clients sign on that dotted line, they are looking for reasons why your law firm is—or is not—the right fit. Some things you can’t control (your location or area of expertise). But why let the things you can control trip up your efforts to get new clients? In all situations, one thing is critical: You don’t waste clients’ time. That includes on the telephone. — *Noble McIntyre*
- **Balancing constant client calls and personal time.** As managing partner at a small firm, I found it increasingly difficult to keep up with clients’ demands as my practice grew. Many weekends I spent more time on my phone talking and emailing with clients than I spent enjoying my “free” time. The constant demands were causing me great stress and affecting my personal relationships. I decided I needed to cut down on the after-hours and weekend communications, but I feared losing business. What I needed was a strategy for managing clients’ after-hours calls and emails. — *Steven Palermo*
- **Four productivity building blocks of effective, efficient and happy lawyers.** The minutes of your life are finite. Learn to manage them wisely and you’ll be a happier lawyer—one who spends less time catching up and apologizing and more time satisfying clients. — *Jay Harrington*

STAY CONNECTED NO MATTER WHERE YOU ARE WITH RUBY'S MOBILE APP

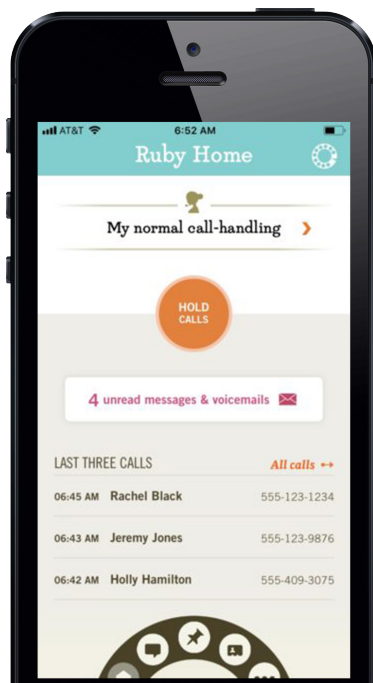
Break free from your desk with Ruby Receptionists' mobile app. Our features make our app the perfect tool to stay connected and manage your calls while on the go!

Status: Take Your Office on the Road

When you're on the go, you want everything you need to stay in touch with your customers at the touch of a button. Our status tool allows you to easily create new temporary call handling instructions and save your favorites as shortcuts. It's so simple, you can even update your call handling while walking down the street! Tap "Hold Calls" once to hold your calls until further notice and have receptionists take messages or offer voicemail; tap again to resume your normal call handling. Plus, you can schedule status updates for the future from the app, ensuring Ruby, and your callers, never miss a beat.

Choose Your Caller ID: Two Lines, One Phone

With Ruby's Choose Your Caller ID feature, there's no need for extra hardware—one phone does twice the work, without costing you privacy. Display your cell number or your business number when making calls through the app. By choosing your caller ID, you decide when to keep your personal cell number to yourself. You're in control! Ruby can provide you with a local number or host your current number so you can leave your landline and all the bills associated with it behind.



Activity: Sophisticated Call Management

- Manage your calls like you would your emails with our revamped call activity options.
- Star important calls
- Multiple filter options for easier search
- Ability to mark calls as read and archive for a clean inbox
- Set reminders to return calls or call customers back directly from the app

More Options With Apple Watch

With the Apple Watch you can:

- View your last three calls
- Return a call from one of your last three calls
- Set a status in one tap

Call Forwarding: Route Calls Wherever, Whenever

With the tap of a screen, our Call Forwarding feature lets you fine-tune your caller experience.

- Forward calls to Ruby, or any other number—keeping you in control of how much or how little you use our live service.
- Set calls to ring to a number of your choice, then roll over to Ruby, so you always have the option of answering first.

With Ruby's mobile app, you can more efficiently manage your calls while continuing to preserve and perpetuate real, meaningful connections with your callers.

To download the Ruby Receptionists mobile app, visit www.callruby.com.

"ONE REALLY GOOD IDEA EVERY DAY"

About Attorney at Work

At Attorney at Work, our goal is to give you "one really good idea every day" to help you create a law practice—and a life—you love.

LAW PRACTICE TIPS DAILY

Daily posts, features and book-length downloads are written for you by a crowd of expert authors—well over 200—who come from the vanguard of practice management and legal marketing. Columnists deliver tips on marketing and business development, law practice management, technology, productivity, ethics, communication skills, content marketing, well-being, professional development and much more. These experts have an uncanny way of zeroing in on what you need to move your practice forward, no matter where you sit: small firm partner, Biglaw associate, in-house lawyer or solo entrepreneur.



"The bloggers of Attorney at Work truly fulfill the promise of their slogan: 'One really good idea every day for enterprising lawyers.' Law practice management may not be for the faint of heart, but the tips and tricks offered by this blog can make it easier."

— ABA Journal Blawg 100 Hall of Fame



© Attorney at Work. All rights reserved.
Illustrations © iStock photo.

DID WE MENTION IT'S FREE?

If you're not already a subscriber, take a quick second to [sign up](#). You can choose a Daily Dispatch or Weekly Wrap subscription (or both) for the same price: Free!

BROWSE THE BOOKSTORE

In addition to the Daily Dispatch and Weekly Wrap newsletters, Attorney at Work publishes its own books and offers a short list of titles from other legal publishers, all available in our [Law Practice Bookstore](#).

Explore the website at www.attorneyatwork.com

Follow us on Twitter [@attnyatwork](https://twitter.com/attnyatwork)

Find the Attorney at Work page on [Facebook](#)

Join the [LinkedIn Attorney at Work Group](#)

GIVE US A LITTLE CREDIT ...

Sure, go ahead and send this download to a friend or two, but if you want to reprint or excerpt a particular article, contact us for permission and give proper credit to the author and Attorney at Work.

QUESTIONS?

Email editor@attorneyatwork.com