

# Shared Goals / Shared Successes: The Client Focused Firm

ILTA – 24 August 2010 11.00am – 12:30 pm

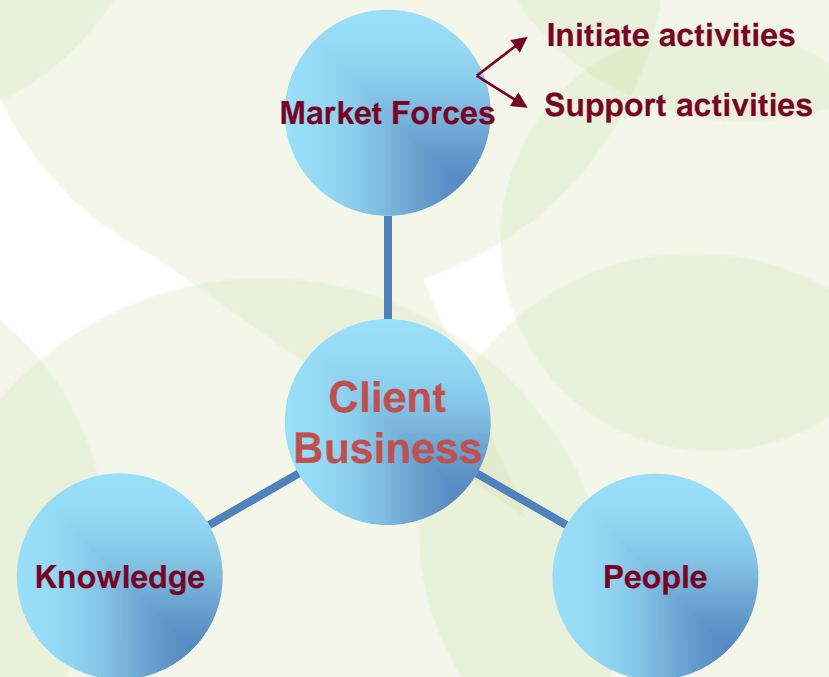
Michelle Mahoney, Mallesons Stephen Jaques  
Jonathan Maas, Ernst & Young LLP  
Joel Vogel, Kroll Ontrack

# Welcome

- Michelle Mahoney, Mallesons Stephen Jaques, Melbourne, AUS
- Jonathan Maas, Ernst & Young LLP, London, UK
- Joel Vogel, Kroll Ontrack, Minneapolis, MN, USA

# Understanding client business drivers

- Conduct periodic meetings with clients to discuss goals, key issues and future business considerations
- Clients' present to firm
- Secondments
- Work onsite from time to time
- Ensure multi-disciplinary team have shared insight
- Systematically share client knowledge
- Educate all staff on client-centric programs
- Competitive advantage from tacit



# Client Feedback

- Independent industry surveys and the like can be excellent mechanisms to measure progress and validate behavioural change
- Independently conducted client survey results have currency and can set benchmarks
- Structured in-depth client satisfaction surveys undertaken by firm



## ACC Value Index



### What is the Value Index?

The ACC Value Index is a client satisfaction measurement tool that helps ACC members share meaningful information about the value they get from their outside counsel. It is a component of the larger [ACC Value Challenge](#) initiative, reconnecting the cost of legal services to the value provided.

# Managing clients' expectations

- Understand how the client defines value
- Conduct pre-matter planning session before major matter commence:
  - agree goals and objectives
  - outcomes
  - fee estimates and milestones
  - team members and project lead
  - communication
- Conduct end of matter debrief
- Provide estimate to budget updates prior to billing
- Clarify expectations

# Technology Adding Value to Clients

- Collaboration technology is changing interaction methods:
  - Federated (internal and external) instant messaging
  - Presence visibility
  - Document storage and recall
  - Financial information
  - Deal Room/Extranet
- Technology can be the glue that binds

# Presence Systems: Taking integration to the next level

General Counsel comments:

"Very powerful tool to have something with all our files on it, it's incredibly useful, we can get in there and look at absolutely everything."

"I have had a closer look at Mallesons Connect which I find really impressive & helpful."

"I have just spent some time browsing on Mallesons Connect - this is a great tool - very interesting to see how transparent it makes some aspects of relationship. Very helpful."

# Client internal environment

- Litigation collection processes provide insight into infrastructure
- Data maps can be useful tools for collating information around systems and set up
- Develop relationships with clients' business and operational people to better understand the modus operandi (in addition to legal issues)
- Conduct joint training sessions with legal counsel to technology departments
- Act as an interpreter for legal counsel with their technology department
- Encourage a “teaming” approach



# Operational infrastructure and legacy systems



- Work with clients to document or store detail on operational infrastructures and legacy systems
- Build glossary of client specific terms, phrases and lexicon which includes technology systems
- Read and store key protocols and policies for your clients

# Future Planning

- Assign knowledge resources to monitor specific industries and clients including news alerts
- Deliver into legal and non-legal staff In Boxes daily client news and market information about key clients
- Arrange for clients to present their take on best practices
- Share industry and IT knowledge to help your clients grow
- Joint attendance and offering of conferences or seminars

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