

JUNE 2020

LPM

LEGAL PRACTICE MANAGEMENT

THE ONLY
MAGAZINE
FOR LAW FIRM
MANAGERS

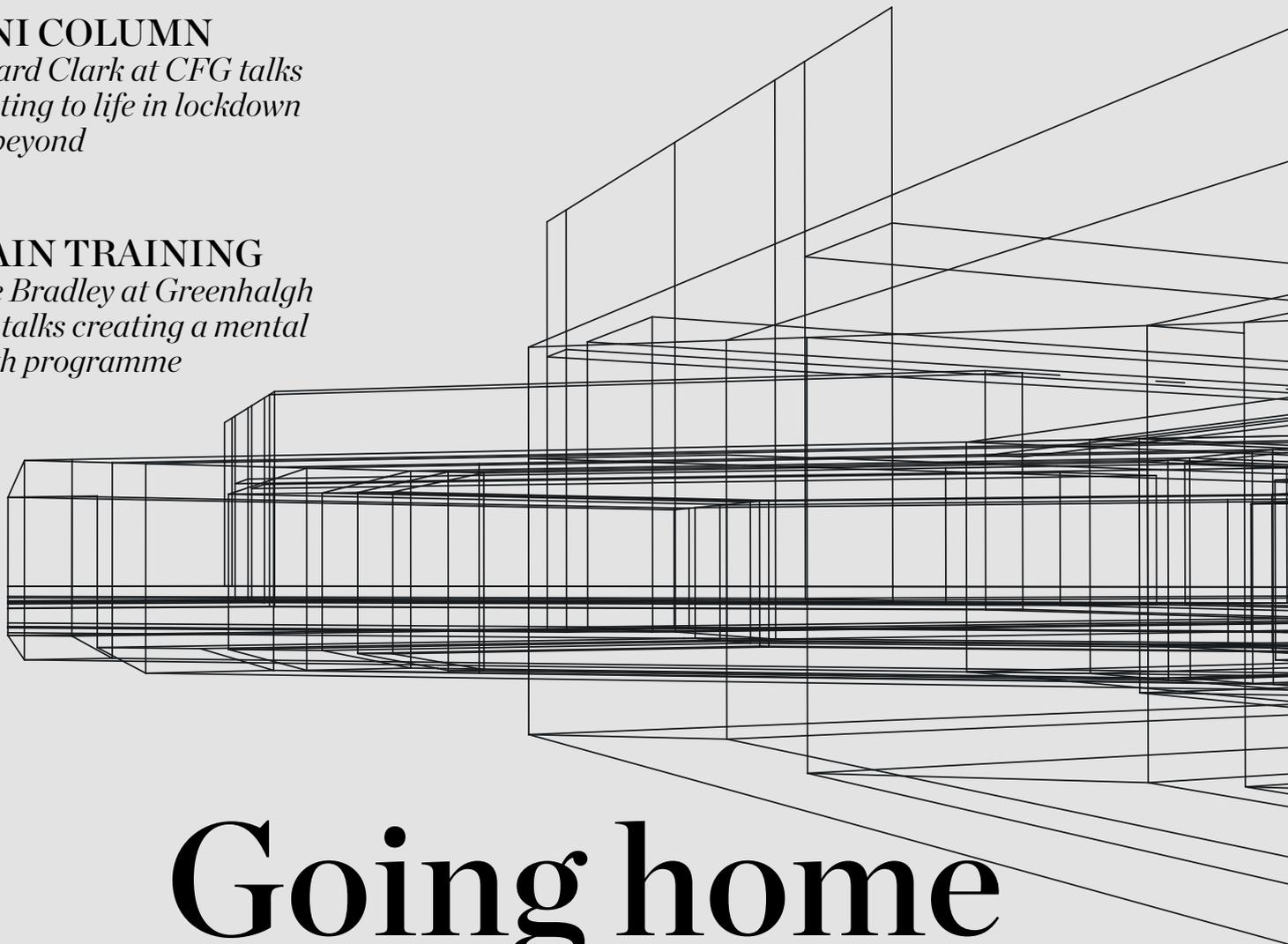
EXPERT
COLUMNISTS
AND ADVICE
FROM PRACTICE
MANAGEMENT

MINI COLUMN

*Richard Clark at CFG talks
adapting to life in lockdown
and beyond*

BRAIN TRAINING

*Steve Bradley at Greenhalgh
Kerr talks creating a mental
health programme*



Going home

*LPM takes a building inspection of the conveyancing practice area - what
can other areas learn about its fittings?*



Maintaining presence is key so that you are front of mind with your clients when they're ready with their next instruction or to send a referral your way

Relationship intelligence

BRIAN COVENTRY, THE DATA OPTIMISER

It's impossible to predict the extent or impact the Covid-19 pandemic will have on professional service firms, and more broadly, businesses and your clients, in the long term.

Now, more than ever, clients need their lawyers to bring them through the uncertainty and navigate complexities, manage risk and protect assets. Or to simply be there to listen.

Nurturing and guiding clients is undoubtedly your paramount focus right now. Maintaining presence is key so that you are front of mind with your clients when they're ready with their next instruction or to send a referral your way.

What's important is being able to monitor, manage and report on client interaction – but how can this be achieved accurately and simply?

Here, we take a closer look at how (using Client Sense) a data-driven approach to identifying client relationships will provide the visibility needed to leverage a new strategic capability:

Client care and management – Ensure contact with your key clients and referrers is maintained. Rest assured that you and your team, even when working remotely, know who is in contact with whom and that your existing relationships are secure.

Managing internal staff changes – In the event of a planned or unplanned unavailability of an employee, quickly identify external relationships most likely to be impacted. Then identify who else in the firm knows the same contact and may be able to maintain the client or referrer relationship.

Identifying external staff changes – Be aware of staff changes on your client side that may impact your ongoing commercial relationship. Our Client Sense platform can identify these external contacts. Acting on this information can help you to protect the client relationship before it strays. You can also leverage this knowledge

and act quickly if an external contact changes organisation. This potentially opens a new and welcome opportunity for the firm to engage with the contact at the new organisation.

Targeted cross-servicing – Cross-servicing or cross-selling is of the utmost importance. You're likely to have one or more groups that have slowed down significantly, yet those groups will hold relationships into businesses that could and should benefit from the sought-after areas of your firm. Client Sense quickly identifies these opportunities based on prior contact. It then assesses the best contact internally to make an introduction and identifies where these beneficial introductions have and have not been made.

Strategic, industry-focused prospecting – Focusing on a particular industry enables you to provide what clients are looking for right now – expert advice, knowledge, insights and understanding of their situation. You and your team are seeing first-hand the issues and complexities businesses are facing within certain industries. It's crucial to leverage this insight to find new, industry specific clients. Clients want advisors who know their business and understand industry nuances.

Into the future, the visibility that Client Sense automatically provides allows for an entirely new strategic capability. With real-time communication information and 360-degree relationship mapping, you and your firm can perform much more strategically to increase and maintain revenue.

Don't let the pandemic define you and your firm. Together, let's propel you forward, armed with client data insight to manage key relationships, explore business development opportunities and most importantly, maintain revenue. **LPM**



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Client Sense

Data-driven client retention
and business development solution
for Professional Services firms

Win work, keep clients

Client Sense automatically joins the dots for you, providing you with the visibility you need to manage, protect and grow the relationships that drive revenue.



**Key Client
Monitoring**



**Referrer
Management**



**Client Relationship
Mapping**



**Winning
New Work**



**Succession
Planning**



**Key Staff
Departures**



**Key Client
Contacts**



**Client
Retention**

“Client Sense provides us with the visibility to easily manage our key client and referrer relationships, through a clean and simple interface”

James Rimmer, Director - Marketing and Business Development, Cooper Grace Ward

View a demo

Connect with us on LinkedIn and Twitter or schedule a time for a tailored demonstration via our website

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