# Client Service Review Model (CSR)

***A Powerful Client Development Tool***

WOMBLE CARLYLE
INNOVATORS AT LAW®

# TWO CORE BELIEFS

- We are in the business of helping our clients succeed. When our clients succeed, we succeed.

- A firmwide focus on achieving high levels of client satisfaction positively impacts key drivers of law firm revenue and growth. It’s FOUNDATIONAL.

# Client Service Review

**When can a CSR be used?**

- Annually with existing clients who have been clients for a year or more.
- At the completion of a major engagement.
- In year one with a new client to ensure that the client's expectations are being met and to make any necessary client service adjustments.
- When the key WCSR contact with a client changes.

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# Client Service Review

**Takes about one hour –**

- Works over breakfast, lunch, dinner or as a stand-alone meeting.
- Is most effective face-to-face.

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# Client Service Review

- **Four parts to the CSR model -**
  - **"Thank you."** Say the words!
  - **Looking back:** Ask the client for feedback on work done recently or over the last "x" months. "Looking back over the past year, what could we have done *differently* or *better* to serve you?" Be quiet and listen.
  - **Looking ahead:** Ask the client to share what he/she sees as possible/likely needs over the next 6,12,18 months. "Looking ahead over the next 6,9,12 months, where do you see your organization headed and what should we be talking about in order to help you get there?"

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# Client Service Review

- **Four parts to the CSR model – cont.**
  - **How Else Can We Help:** Ask the client if there are any other practice areas we are not currently helping them with that they might be interested in learning about to determine if we might be of additional assistance to them. "We've helped you in several practice areas (name them). Are there any areas that we are currently not helping you with that you might be interested in learning more about to determine if we might be of additional assistance?"

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