

**HOW TO WIN CLIENTS  
AND MAKE THEM  
THE BEST SOURCE OF  
NEW BUSINESS**

**TOUCHPOINT CHECKLIST**

**LAURIE BROWN**

# Client Touchpoints

**Touchpoints are any encounter between your client and your firm.** They can be person to person or virtual. Every interaction your client has with any of these touchpoints is an opportunity to win or lose that client. Think of each positive client encounter as a deposit, and each difficult or negative encounter as a withdrawal. If you are in a negative situation you will either lose the client, or worse, have a client who'll make ruining your reputation their life's work.

Use this list to rate yourself on each touchpoint in two areas: EASY (are your processes and policies easy for your client?) and NICE (are your people nice?) Ask yourself, what does my client expect at this touch point? How can I remove any roadblocks at each touch point? (This list is not exhaustive.)

We are often terrible at seeing our own roadblocks. Ask a friend or family member who isn't involved in your practice to experience your touch points and give you feedback.

## Marketing

### Benchmark:

- Is it easy to find your contact information in all of your client outreach?
- Does your outreach express empathy to your potential client?
- 
- 

## SEO

### Benchmark:

- Does your firm come up on page one of a search for your speciality?
- Do you know all the keywords your potential clients would use to find you?
- 
- 

## Social Media

### Benchmark:

- Do you know all the sites where your clients may talk about you?
- Do you monitor and respond to social media postings, both positive and negative?
- 
-

## Client Touchpoints

### Website

**Benchmark:**

- Is your contact information easily found on all pages of your site?
- Is there an FAQ section?
- Are necessary forms easy to find and fill out?
- 

### Phone

**Benchmark:**

- Can the client call you directly?
- Do you force them to go through a confusing phone tree?
- Do you return voice mail the same day?
- 

### Email

**Benchmark:**

- Do you return email by the end of the same day?
- 
- 
- 

### Office

**Benchmark:**

- Is it easy to park by your office? If not, do you provide help with parking?
- Do you provide clear directions to your office on your website?
- 
- 

### Receptionist

**Benchmark:**

- Does your receptionist greet your client immediately?
- Does your receptionist use the client's name?
- Does your receptionist offer a beverage?
- Does your receptionist manage expectations about when you will be available?
- Does your receptionist offer updates every 15 minutes?
- 
-

## Client Touchpoints

### Secretary

**Benchmark:**

- Does your secretary listen well?
- Is your secretary organized?
- Is your secretary responsive?
- 

### Paralegal

**Benchmark:**

- Does your paralegal listen intently?
- Is your paralegal able to explain complex ideas in a way that is easily understood?
- 

### Attorney

**Benchmark:**

- Do you manage your clients time expectations?
- Do you show empathy?
- Do you explain complex ideas in a way that is easily understood?
- Do you regularly update your client on progress?
- 
- 

### Live Chat

**Benchmark:**

- Does your live chat representative offer exceptional service?
- 
- 

### Virtual Receptionist

**Benchmark:**

- Is your virtual receptionist friendly and professional?
- 
- 
-

## Client Touchpoints

### Answering Service

Benchmark:

- Does your answering service sound like your office staff?
- Does your answering service provide empathetic responses?
- 
- 

### Text Message

Benchmark:

- Do you respond to text messages within a few hours or sooner?
- 
- 
- 

### Client Portal

Benchmark:

- Is your client portal easy to navigate?
- Is your client portal personalized to your client?
- 
- 

## Improvements