

Value Practice:

Collaborating without Gatekeeping: Focus on Client Service

Mark Stewart

Interviewed while: Partner, Ballard Spahr

September 2008

Key attributes of Ballard Spahr's preferred provider approach to client service:

- No Gatekeepers within the firm – clients can contact any Ballard Spahr lawyer without having to go through the lead relationship partner for that client
- Assign key personnel so that the client has consistency and the ability to tap into a team of lawyers who understand the client's business
- Choose work that the firm is best for- go after work that the firm has expertise to handle; don't go after everything
- Don't let fee arrangements get in the way of doing the work – focus on client service and stay flexible and open to alternative fee arrangements (including: pay us what you think the work is worth although most matters are handled on a blended hourly rate fee arrangement)
- Provide data in the form requested by the client- may include installing e-billing systems to facilitate ability to transmit data in the form and using systems that the client designates
- Learn the client's business- participate in client preferred provider meetings, periodic practice group conference calls and other opportunities to help maintain focus on the client's business and share knowledge on portfolio of client work with other preferred partner firms to enhance the collective value of legal services to the client
- Monitor the relationship- ensure that it is working for both the corporate client and the law firm
- Stay flexible- know that nobody is locked in and the in-house lawyers or lawyers within the firm can pick up the phone to dialog about what's working and what adjustments need to be made
- Share lessons learned- when a firm has a preferred relationship with a corporate client that includes a broader portfolio of work, lawyers within the firm have collective greater insights into issues the corporate client faces and can help share lessons learned

In Specific: Monitoring and Collaborating

Monitor the Relationship to Ensure Client is Receiving Value and Arrangement is Working:

Following is a list of some of the practices implemented to monitor the relationship with a focus on value to the client.

- No client-facing gatekeeping: clients can contact anyone within the firm to handle client work. This streamlines processes and helps get work to the lawyer who will be providing the service. Lawyers within the firm must input matters into a 'file opening system,' which requires approval of the relationship partner to help 'register' it within the firm's portfolio of work for that client.

- Relationship Partner reviews billing sheets: each month, the lead relationship partner tracks billing sheets for lawyers within the firm handling work for the corporate client. The purpose is to understand who is doing work and what the nature of the work is (since work can be sent directly to lawyers within the firm without first going through a gatekeeper).
- Conversations within the firm about progress on client matters: each month, following review of the billing sheets, the Relationship Partner will call on other lawyers within the firm working on matters for the client to ask about appropriate progress and track progress against early case assessments
- Conversations with the client about satisfaction: talk to in-house lawyers to ensure that they are satisfied with the services they are receiving and the fee arrangements; make adjustments as necessary.

Collaborating within the Firm and Rewarding Collaboration via Compensation:

- Client can call any lawyer within the firm without going through the lead Relationship Partner- No Gatekeeping
- Premium within the firm on helping each other
- Firm has an Allocation Committee that meets with every partner each year. The Allocation Committee consists of 9 partners. The purpose of the meetings is to discuss:
 - Who has helped the partner to be successful; and
 - Who is key to the various client relationships
- Allocation Committee places a premium on helping each other; partners are given credit in compensation determinations for helping each other – regardless of who opens the file
- By creating incentive to focus on the client via rewarding collaboration in compensation determinations, the focus is on value to the client rather than on personal billings for the lawyer on point for the file/client

Contact Information:

Mark Stewart (Stewartm@ballardspahr.com)