

# CLIENT INTERVIEW EXAMPLE TOOL KIT

Dear (Client):

On behalf of (firm), thank you for being a valued client. (Firm) is committed to continually improving its service and client relationships. In order to do this effectively, we need your input. We will be conducting confidential client feedback interviews with some of the firm's key clients. (Interviewer or scheduler) from (firm) will contact you in the next few days to schedule a client satisfaction interview to be conducted by (interviewers) at your office on behalf of the firm. The interview should take no longer than one hour and we ask you to provide candid feedback about your organization's experience working the firm's attorneys and staff. We thank you in advance for participating and look forward to learning how we can better serve your business and legal needs. Please contact (interviewer or scheduler) with any questions at (contact number).

Very truly yours,

Managing Partner or Initiative Leader

Dear (Client):

This (letter/email) will confirm the client satisfaction/feedback interview scheduled with (interviewer) on (date/time) at (client's offices). Thank you in advance for your time and willingness to provide candid feedback about your experience with (firm.) Please contact (interviewer or scheduler) with any questions at (contact number).

Very truly yours,

(scheduler/interviewer)

---

INTERNAL EMAIL

**Re:** Client Feedback Interviews

---

(Firm) is committed to providing extraordinary client service. In order to measure our clients' satisfaction with our firm as well as gain a better understanding of their businesses and legal needs, we will conduct confidential interviews with many of the firms' key client relationships. In addition to measuring general satisfaction, the objectives of these conversations include:

- Increasing client loyalty;
- Identifying opportunities to expand client relationships;
- Gaining a better understanding of our competitive landscape;
- Preventing potential erosion or loss of work;
- Determining our market share;
- Understanding our strengths and areas for improvement; and
- Providing market differentiation.



we will be interviewing.

To the extent possible, please provide us information on the items described below.

1. For each client to be interviewed:
  - List of significant matters you've handled;
  - List of firm contacts;
  - List of corresponding client contacts;
  - For each client contact, identify nature of the relationship as routine business related, business development related or social (include those to be interviewed as well as other contacts);
  - Summary of three year or more billing history; and
2. List of target client prospects, markets and industries identified by the firm to better understand strategic considerations and goals.
3. To the extent possible, list of direct competitors for this work by market.

Also be prepared to discuss:

1. How long the firm has represented the client?
2. How did the relationship partner come to represent the client?
3. How long has the relationship partner represented the client?
4. How is success defined in the client relationship?
5. How do you receive new assignments from the client?
6. What are the perceived opportunities for growth with the client?
7. Who are the key executives in the company the firm regularly interacts with?
8. Are there cross-selling opportunities with the client?
9. What, if any, perceived or real barriers exist to expanding the client relationship?
10. Have there been any service or other challenges with this client? What were they?
11. Is there a succession plan for the firm's representation of the client?
12. What have been your firm's interactions with the client over the past 12 months outside of legal representation, categorized as routine business-related, business development related, or social.
13. Your views on the competitive landscape with that client.
14. What are the communication and/or work style preferences of the individuals to be interviewed?

## (FIRM) Client Feedback Interview Model Questionnaire

### **Industry and Information Dissemination Questions:**

1. What are the new developments and trends in your industry?
2. How has your company been impacted by ....
3. What keeps you up at night:
  - a. business/industry trends
  - b. legal and regulatory changes
  - c. new political and economic landscape, etc.
  - d. operating issues and international growth
4. How do you currently receive industry/business information (what publications, client alerts from law firms, newsletters, etc.)
5. What type of information or research would you be interested in receiving from us? Are there some things we should track to make sure you are properly informed in a timely fashion?
6. As far as receiving information, what is your favorite format (newsletters, advisories, blogs, newspaper, etc.)?
7. Other specific business/industry questions - anything we can offer better or more frequent off the clock lawyer/value add resources, contact that could reduce your stress

### **Overall Satisfaction and Selection Questions:**

8. How did you select our firm?

9. Did you initially select the firm, or an individual within the firm, as your initial contact point? Please describe the relevance of the individual versus the overall firm in your selection
10. Is the firm's reputation relevant to you in the selection of a law firm? Do people tend to hire firms, individuals or practices?
11. Overall, how satisfied are you with the quality of service provided by (FIRM)?
12. What do you think we do well?
13. What do should do differently?
14. What percentage of your legal work is performed by (FIRM)?
15. What other law firms and lobbying firms do you regularly use?
16. What do they do well?
17. What criteria do you use to select outside counsel? What's the most important? How do you rank the criteria?
18. How do you evaluate performance of the firms you hire?

**Performance and Service Questions:**

19. Do you think (FIRM) attorneys and lobbyists understand your organization/industry and its products, services, objectives and competitive challenges? How do you gauge that understanding?
20. How do you evaluate work product quality? (How do you know you are getting quality product or service? Does the firm demonstrate that quality?)
21. How satisfied are you that the firm/attorneys understand your company's specific legal needs? Your industry?
22. How well does the firm balance legal requirements and business needs?
23. Does the firm provide proactive, creative and innovative solutions?

How would you rate the firm's performance in the following areas? (Excellent -5, Very Good -4, Good -3, Fair -2, Poor -1)

The attorney/firm:

24. Provides an honest evaluation of situations
25. Delivers desired results
26. Listens well
27. Provides appropriate staffing for matters
28. Understands and meets your needs
29. Provides practical solutions
30. Staying within agreed costs/budgets
31. Treating you/your team as a valued client
32. Overall service

**Communication and Responsiveness Questions:**

33. What is your (your organization's) definition of responsiveness? Does the firm meet that definition?
34. Using that definition are telephone calls/emails returned promptly?
35. How accessible are the attorneys?
36. How do the attorneys relate well to your team? Do you feel you have the correct mix of skill levels, etc. working with your team?
37. What is your preferred method of communicating with outside counsel?
38. How satisfied are you with the firm's communication to you regarding the progress of their work?
39. If you have contact with firm staff, have they been professional, helpful, etc.?

**Legal Fees, Budgets and Billing:**

40. Do you feel that you receive value for the fees you pay?
41. Are fees reasonable, below/above market value, fair?
42. Are the bills accurate, sufficiently detailed, reasonable, and timely?
43. What standards do you request for bill formats? Are the firm's bills formatted to your standards?
44. Have you ever had to resolve a billing issue? How was it resolved? Were you satisfied with the results?
45. Are you provided adequate information for predicting budget needs? How do our attorneys help you in that process?
46. What is your annual budget for legal services?
47. What type of alternative fees do you have experience with, and are you interested in those types of billing relationships?

**Technology:**

48. What are the most effective technology resources you utilize for supporting work in managing matters, billing, projects, etc.?
49. Do you use portals or extranets with any law firms?
50. How do you use our website and other law firm websites?
51. Can law firms offer you creative technology solutions to add value to the relationship, extranets, billing software, doc management, etc.?
52. Does your company use AI tools/resources?
53. How do you feel about your law firms using AI tools/resources?

**Wrap up questions:**

54. Has the amount of legal work you outsource increased/decreased? Why?

55. Do you anticipate your usage of legal services and lobbyist to increase/decrease in the future? Why?
56. What can the firm do to add value that doesn't end up on the bill?
57. What are the top three challenges you face (personally/professionally, legal department or company)?
58. Diversity is very important to us and we are curious to know how you measure and hold your law firms accountable.
59. What have I not asked that you would like to discuss?

Thank you email

Dear (Client):

On behalf of (firm), thank you for taking the time to meet with (us/interviewers) and for providing candid feedback about your experience working with our firm's attorneys and staff. We value your input and use the feedback our client's provide through our Client Service Interview Program to build better relationships with clients, gain a better understanding our client needs and to continually enhance and improve our services.

As we discussed, we will provide a summary report of the interviews conducted at (client org.) to the (client team/client relationship partner) within two weeks and (client relationship partner) will follow up with you on (include any specific requests or follow-up recommendations that need short term attention). Don't hesitate to contact (interviewers) or (relationships partner) if you have additional thoughts or questions. We enjoyed meeting you and learning more about (client organization).

Very truly yours,

Interviewers

---

### **Model Client Feedback Report**

Interviews were conducted with five attorneys in the legal department at ABC Corporation on (date). The overall level of satisfaction with XYZ firm is 4 (very good). This client clearly values the relationship and intends to continue working with the firm on an ongoing basis. In most areas the firm meets client expectations. The recent transition of leadership to (new GC) presents an excellent opportunity to build a better relationship with (him/her) and others in the department and to adapt (his/her) style of management. The following report includes a common themes, average satisfaction scores, summaries

of the individual interview notes, suggested actionable follow-up and industry resources used by the department.

### **Common Themes**

- Perceived lack of depth in talent and lack of supervision of associates
- Consistently achieve results for client
- Great sense of business history and institutional knowledge
- Responsive
- Leadership change will result in evaluation of existing outside counsel relationships
- XYZ firm considered (local city) firm –(branch city) office considered litigation shop
- XYZ firm is go to firm for “mission critical” and other complex litigation
- Firm is meeting expectations but could exceed expectations
- Past service and quality concerns have been addressed but have also recurred
- Legal staff value law firm sponsored educational programs
- Legal staff wants to work with a small and consistent team of attorneys

### **Ratings 1(poor), 2(fair), 3 (good) 4 (very good), 5 (excellent)**

- Overall Satisfaction – 4
- Provides and honest evaluation of situations – 4.6
- Delivers desired results – 4.5
- Listens well – 4
- Provides appropriate staffing for matters – 3
- Understands and meets our needs – 4
- Provides the best available advice – 4.6

### **Individual Interview Notes**

#### **(New GC), General Counsel**

(New GC) said he “inherited” the relationship with firm XYZ through (predecessor’s) relationship with (partner). The relationship extended beyond that through his predecessor’s relationship with (partner). (Partner) in turn has continued to do a good job for (old GC) through the years and the relationship with ABC Corp. has continued.

(New GC) has been satisfied with the work provided by the firm but admits he doesn’t know the attorneys very well. He knows a few of the legacy (old firm) attorneys he worked with at Firm M and specifically mentioned (partner). (He also worked at Weil Gotschal.) (New GC’s) perception of the firm is of a limited presence known in (city) with a focus on litigation. He thinks of (old firm) as a labor firm with a “decent” corporate practice and considers both firms “big in (city).”

(New GC) looks at four main criteria for hiring outside counsel: 1) cost; 2) reliability; 3) responsiveness; and 4) ability to make a “business decision.” He said (partner) has gotten good results and they appreciate (partner’s) position in the firm. (New GC) likes to work with attorneys he perceives as having

“power” or clout in their firms. He believes this “power” helps the attorneys get things done because they can impact the speed and attention paid to specific projects. He always gets a quick response when he calls XYZ.

NEW GC admitted that most of his outside counsel are not especially responsive and often must be reminded about deadlines. Poor quality work annoys him and he specifically said he “doesn’t want to edit associate work.” Their expectations (for outside counsel) are generally low. NEW GC claims he is often disappointed with outside counsel performance and mentioned a recent quality control issue with a very large firm. He attributes these problems and general disappointment with outside counsel to the fact that “lawyers in general are bad managers who do not police their own internal issues very well.” These comments were about law firms in general and were not directed to or reflective of his experience with XYZ FIRM.

NEW GC wants law firms to take work off his team’s plates so they can focus on other projects and strategic issues. He wants the outside counsel to “do a full spectrum job on a project from start to finish.” He wants firms who can do the work, recommend solid business solutions and give advice.

The legal department has about 20 attorneys across the country right now and NEW GC anticipates it will grow to 23 soon. Right now they have client group clusters and practice groups within the department but he is evaluating their organizational structure.

NEW GC said firms that demonstrate industry knowledge are firms that already represent other clients in their industry and similar industries and also have health-law experience. At the end of the day he says “it is more important to have proactive business minded service from outside counsel than extensive industry knowledge.”

NEW GC is happy with the service he receives from XYZ FIRM and says the attorneys are responsive and reliable. He said they do “a pretty good job for us” and have good people. He considers the firm to be in the top 1/3 of their outside firms but also said the firm “seems top heavy.” They primarily deal with partners they consider “very good” but the associates do not seem as good in comparison. NEW GC would like partners to be involved in more of a supervisory role and not active in every single case. He recognizes the competition for talent is tough and also that firms are experiencing the same generational issues as corporations. His perception of XYZ FIRM is that the “associates are not great.”

NEW GC believes (competitor firm) “does it right in health law” and considers them a very specialized resource. Their primary Senior Counsel contact at (competitor firm) is also a “powerful” partner in the firm and has an excellent relationship with ABC Corp.. That relationship has helped make a big difference especially when they’ve had “quality” issues to address.

Firm D is the legacy ABC Corp. firm and they have had a partner on the corporate board. NEW GC does not view this partner as “powerful” in the firm and said they do good corporate work but it is not managed well. (He again repeated that he feels “(Partner) has the clout to get things done.”)

They have also had success with Firm C and some other regional firms or leading firms in smaller cities. He thinks attorneys from these types of firms are better at “being business counsel” to their clients and looking at the big picture. He also thinks they are less “billing obsessed.”

NEW GC feels the fees at XYZ FIRM are in line with their markets and thinks they get good value for those fees. He considers the firm's fees and services very competitive.

As the new GC, NEW GC will be evaluating some of their general policies relating to use of outside counsel and anticipates having a "quasi-RFP process with some new billing guides to control 'rate-creep.'" He thinks the process will help put some pressure on firms to provide more reasonable accommodations to them on fees. He said, "Our budget isn't growing 10% per year" and can't accommodate rate increases that are.

As a company ABC Corp. is rudimentary on technology and NEW GC doesn't see that changing much soon. He appreciates educational seminars and said XYZ FIRM "doesn't do that as much as other firms." They really find value in the CLE sessions provided by some of their outside firms on timely topics. He was not sure if XYZ FIRM didn't normally host many seminars or if they just weren't on the invitation list. He appreciates CLE and similar programs as a way to learn more about firms, their capabilities and as a venue to build better relationships with them. He and most of the younger people in the department find "entertainment" with outside counsel a burden and prefer CLE with networking opportunities a better way to get to know the attorneys.

NEW GC has had no significant problems with XYZ FIRM but mentioned a minor incident he had with an associate one time in the past. He felt it was hard for (Senior Partner) to admit the firm's error.

NEW GC's greatest challenges are to get their department staffed and organized properly and to "do everything less ad-hoc" and reactively. He would like to put some general policies in place for the legal department as well as some agreed upon rules for their preferred counsel. He wants to bring more rhyme and reason to their group.

NEW GC sees more "competition" for XYZ FIRM and other large firms in the litigation area from smaller "boutique" litigation firms. The smaller firms are able to handle cases for them for \$300/hour versus the \$400-500/hour rates at XYZ FIRM. He wants to see if XYZ FIRM is willing to work with him to create a more cost efficient model.

NEW GC doesn't know (senior partner) and said he didn't know if it matters since he thinks (junior partner) is doing a good bit of the work anyway. NEW GC knows (junior partner) from Firm M and thinks she may be a more appropriate contact for their lawyers anyway. NEW GC likes to work with attorneys in their 40's, his peers, and thinks the other in-house attorneys may be more comfortable with peer level outside counsel as well. He was very disappointed that (partner) went to (another firm).

NEW GC thinks law firms should have a better service management program and wishes they would recognize that "different clients have different needs." He wants to know what's going on and be in the loop but right now he wants the firms to take the lead more. This model is very different than his previous views in another in-house position. He wants to work with firms who understand his work style and requirements.

If NEW GC were to go back into private practice he would be more aggressive and persistent about asking for work from clients and would develop a customer support mechanism to help manage the

relationship. He liked the idea that someone in the firm is focused on service and is not a practicing attorney.

### **(Senior Counsel)**

Senior Counsel's responsibilities include operations, packaging and procurement. She perceives XYZ FIRM as a litigation firm and does not think it is a strong transactional firm. She has used (Young Partner) a good bit for contract review and thinks he does a good job. She knows he has more of a litigation background. (Young Partner) spots the issues that are there but is not as adept at making suggestions to add components to the contract that are missing. She personally likes (Young Partner), uses him frequently and will continue to because of their personal relationship. She also works with (another firm) and feels a younger associate there does a better job on the same type of work. She is a little concerned that she is paying partner rates but not getting partner performance.

She has been outsourcing more work than usual lately because of staffing gaps internally but thinks it has worked out okay. She knows NEW GC is working on identifying some of the departments needs and expects the increase in outsourcing to be temporary.

When selecting outside counsel Senior Counsel usually goes with recommendations from people she knows, colleagues in the department, other in-house counsel contacts or attorneys with whom she has an existing relationship. She feels the most important attribute of outside counsel is "practical business sense." Her work does not require complicated legal skills but common sense. She wants to work with attorneys who can look at each situation from a "risk standpoint" and help her make good business decisions.

Senior Counsel rates XYZ FIRM's responsiveness as excellent. Their internal expectation is to receive calls back within 24 hours and XYZ FIRM attorneys are very responsive. Senior Counsel feels the firm provides good value for the fees in the litigation area but not in her experience with transactional/contract work.

Firms that "add value" give her "ideas for creative strategies – things we haven't thought of not just redlining our work product." She appreciates attorneys who come to their group meetings and present topics and legal updates that are of interest to the whole team. They recently had programs on general mergers and acquisition issues and governmental investigations.

Senior Counsel's greatest challenges for the year ahead include increasing business with international companies (international contracts) and product shortage issues. They were actually experiencing a product delivery crisis while I was in the office and our meeting was cut a bit short so she could handle it.

Senior Counsel works with (Competitor Firm) regularly and considers them very "strategic" thinking. She also works with Firm K and calls the attorneys "bulldog and relentless." She considers XYZ FIRM a "fine solid big local firm but not a (Competitor Firm) or Davis Polk." She called (Sr. Partner) "awesome and a good value" but said she's not sure there is much depth beyond (Sr. Partner). She would like to see the firm have more "direct reports" to (Sr. Partner).

### **Senior Counsel – Transactions**

(Sr. Counsel Transactions) is primarily a transactional lawyer and considers his workload more predictable than his counterparts who handle litigation. He uses fewer outside counsel than they do as well.

(Sr. Counsel Transactions) had responsibility for a subsidiary's legal work in a 2003 acquisition. One year after the transaction was complete, auditors uncovered something suspicious. He hired one outside counsel to help with the investigation and hired XYZ FIRM to file a motion against two employees over the issues. (Sr. Counsel Transactions) was happy working with XYZ FIRM and said (Senior Partner) found me the "right people" to staff it. He recalls (Senior Partner) handled approximately 20% of the staffing as well as determining the "strategy" for the case and expects (XYZ Litigator) had day to day implementation responsibility.

He recently asked for (XYZ Litigator) on another case but (XYZ Litigator) was not available due to a conflict with the trial date. He is working with Greg and Don and is pleased with them. The case involves a customer violating a non-compete.

(Sr. Counsel Transactions) considers selecting outside counsel as something he's "not good at." In his previous positions he worked with bosses who made clear choices for the company's outside counsel for the entire department and ABC Corp. is not like that. He was also based in Southern California during that time and does not feel he knows many of the local or East coast based attorneys and firms.

(Sr. Counsel Transactions) has his routine contacts for certain things but beyond those issues he always checks with (New GC) or one of the other in-house attorneys for suggestions. Just recently (New GC) suggested XYZ FIRM attorney, (XYZ Trans. Atty.) because he had handled a similar retail question for him. (Sr. Counsel Transactions) has been in contact with him and thinks it's a good fit.

Beyond direct referrals from his colleagues (Sr. Counsel Transactions) may also reach out to his other law firm contacts for referrals and uses Martindale Hubbell to check out referrals.

Competency and "getting a sophisticated answer in 15 minutes" are more important to (Sr. Counsel Transactions) than rates. He also considers the overall (Retiring GC) more important to judge value than hourly rates. (Sr. Counsel Transactions) considers (Competitor Firm) a superstar healthcare firm and also relies on several sole-practitioners "who know my business and can provide overflow for transactional work" managed internally. The larger transactions go to Firm D, Firm R and Firm T. He also relies on Firm K when customers stop paying.

(Sr. Counsel Transactions)'s experience with XYZ FIRM is limited but he knows leadership is comfortable using the firm for "mission critical litigation" matters that are material to company policy and business.

(Sr. Counsel Transactions) expressed some concern about XYZ FIRM's timeliness in meeting deadlines, some critical. He said, "I won't go back to firms who don't make deadlines." He was not overly critical of the firm in this area but said, "They can do better." He relayed a specific example about sequencing in a current case that should have been handled better and another instance where electronic files were erased because requests for electronic documents were not handled as quickly as they should have been. (Sr. Counsel Transactions) does not think the firm is doing a "bad job, just missing the opportunity to do a better job and exceed expectations." He recalled a couple discussions with the firm about the

timing problems and yet there was a recent deadline for interrogatories that was missed a couple weeks ago.

### **Senior Litigation Counsel**

(Senior Litigation Counsel)'s relationship with (Senior Partner) goes back many years and she has interacted with several other firm attorneys during that time. She said (Senior Partner) has "great institutional and industry knowledge" and understands our business. Overall she thinks XYZ FIRM does a great job and has achieved great results for her. She considers (Senior Partner) and the attorneys on his "team" fine lawyers and are well satisfied with their work. She does see room for improvement with work product quality and communication.

(Senior Litigation Counsel)'s chief complaint about XYZ FIRM is that the associates are not "uniformly strong" in comparison to the partners. She has had some bad experiences with work product quality from associates. They want the work to be done by associates but want better oversight in the selection of associates to work on their team as well as oversight of associate work by the partners. She feels some obvious mistakes have "slipped through the cracks" which would have been caught if the work was being well supervised.

(Senior Litigation Counsel) talked to (Senior Partner) about keeping the working teams small and consistent for their matters. She feels her concerns have been addressed and that (Senior Partner) clearly values the relationship and takes her concerns seriously but the same challenges have recurred.

When hiring outside counsel (Senior Litigation Counsel)'s initial selection criteria has been jurisdictional. She thinks that may change some with of the general changes they will be making in the legal department under (New GC). She predicts they will create a smaller pool of firms they consider "go to" firms and with whom they have a preferred pricing relationship.

(Senior Litigation Counsel) considers (Senior Partner) and XYZ FIRM as the "go to" attorney and firm for litigation. While she has no major complaints with XYZ FIRM she knows there is room for improvement. She likes to work with firms with good communication and collaboration skills as well as strategic business thinking. She wants outside counsel to know that they control the direction of a case but they want counsel to make recommendations and give advice. She thinks Firm K does an excellent job of keeping them informed on the status of cases and says they "set the bar for successful client service."

(Senior Litigation Counsel) said the legal department evaluates law firm performance as a group in an informal way and they frequently discuss law firms in department meetings and one on one. She believes they will be revising their preferred counsel list in the coming months informally and that some firms "won't survive." (Senior Litigation Counsel) considers XYZ FIRM as providing value for fees but does not consider the firm a bargain. She again expressed their desire to have a preferred pricing system with a core group of law firms.

(Senior Litigation Counsel) has an ongoing concern about watching costs. She is pleased that XYZ FIRM is an "early adapter" of technology and values that knowledge and investment but is concerned about frequent charges for "servicing or updates to summation" which she believes should be overhead. She

has not asked the firm not to (Retiring GC) her for this but would like to understand it better. It was not a big deal to her just something on her mind.

When asked about billing in general, (Senior Litigation Counsel) thinks the overall billing could be improved. In addition to the desire for an “attractive overall fee arrangement” she thinks the firms could do a better job with early case assessment. They are incurring additional costs on cases related to e-discovery.

(Senior Litigation Counsel) tells their outside counsel they use Firm M Resources when e-discovery review is involved unless the firm can provide an exceptional pricing option. (Senior Litigation Counsel) said, “None of our firms are really equipped in this area.” She doesn’t look to firms for e-discovery advice. She specifically mentioned that (Competitor Firm) is terrible at e-discovery and Firm D is excellent. E-discovery is (Senior Litigation Counsel)’s greatest challenge for the year ahead.

Firms that can help them “improve their processes, forms and provide ongoing assistance for improvements” add value to the relationship. She would like firms to help make her life easier by looking for innovative ways to add value to the relationship. In closing she reiterated that overall; she is pretty pleased with XYZ FIRM.

### **Retiring GC**

(Retiring GC) considers his view on XYZ FIRM as very limited and calls (Senior Partner) and (other Sr. Partner) his “account partners.” He has been dealing with (Senior Partner) and his people since 1998 and considers them the “go to” litigation firm. Any litigation in the Mid-Atlantic States goes to XYZ FIRM except creditor’s rights/bankruptcy work to Firm K.

(Retiring GC) said, “(Senior Partner)’s work has always been excellent with excellent results and he always wins.” He has worked with about five other attorneys at the firm but did not have much interaction with them. He named XYZ Attorneys, Larry, Curly and Moe and said Moe is “good but a little stiff. He doesn’t know how to handle people as well as (Senior Partner) but he’s very smart.” He also likes Larry. He recalls having met a corporate partner over dinner once but didn’t really have any other contacts in the firm. He also said “he hasn’t ever received a hard sell for using other areas in the firm.”

The one area (Retiring GC) identified for improvement is meeting deadlines. He considers it a typical trait of litigators to wait to do things until the 11<sup>th</sup> hour.

(Retiring GC) has used (old firm) for labor work and knew them from his Steel industry days. He continues to use (XYZ Trans. Atty.) for most of that work but they don’t have much of it. Out of 28 distribution facilities only four are union. He considers (XYZ Trans. Atty.) a “medium key” guy who is solid. He thinks (Senior Partner) can come across as abrasive or hard nosed and may put off people. Despite that he gets them good results. While he likes dealing with (XYZ Trans. Atty.) on a day to day basis he would rather have dinner with (Senior Partner) and said, “He’s more fun.”

(Retiring GC) typically looks at the location of a law firm first for outside counsel selection. He wants to work with the best counsel at a reasonable price. He also typically selects someone he or his staff already knows. After the board member from Firm D left the board, they started using Firm Q in (city). He liked the idea of having two firms so they would not be taken for granted as a client. They also use

Firm P for major spin-offs, joint ventures, mergers, and other large transactions that need an army to complete and (Firm ERISA) for benefits work.

Historically they have not had a formal review process for outside counsel and he considers that kind of paperwork a waste of time. He had informal conversations with his staff about their relationships with law firms. (Retiring GC) recalls the biggest complaint he had about XYZ FIRM from his staff was related to a brief (Senior Litigation Counsel) thought was of poor quality. He also remembers receiving a brief one time with incorrect quotations and minor typos. When he brought it to the attorney's attention he felt like his concern was dismissed. The response was "the fact checker will review before the final draft."

(Retiring GC) used Firm D for litigation once and was unhappy with the service. He felt the attorney constantly advised him they had a strong case but in the end he advised them to settle for \$2M. The attorney's evaluation of the case was not accurate. (Retiring GC) considers (Senior Partner) to be "cautiously optimistic" and feels he does a good job managing their expectations.

Compared to other firms, (Retiring GC) feels XYZ FIRM provides value for the fees because they (specifically (Senior Partner)) really understand their business. He also thinks XYZ FIRM's rates may be a little lower than some of the other firms they use. Their budget for outside legal fees is approximately \$8M. That does not include M&A fees which are included in the transactions.

There is an attorney housed in the HR department to handle administrative legal issues. They use local counsel based on the location of the situation and consistently use L&E Boutique in many of those markets because (L&E Boutique) is approved by their insurance carrier. They employ 13,000 – 14,000 employees but only see a half a dozen cases a year. Most of those cases settle for far less than \$50,000.

### **Suggested Actionable Follow-up**

- Work with (New GC) to make sure he is acquainted with current ABC Corp. service attorneys as well as others who may be able to provide assistance and to determine the appropriate "client service team" based on his changing needs
- Conduct needs assessment interview with (New GC) and others in the department to gain better understanding of work styles and expectations for the relationship
- Create a communication tool to provide project status updates on an ongoing basis
- Create internal communication tool and strategy to help monitor work flow and maintain timelines and monitor deadlines
- Work with legal staff to determine topics of interest for educational component provided by law firm at their department meetings
- Assess associate pool for supporting team members who will fit the unique styles of the legal department
- Establish a regular "review" with the legal staff to assess associate and other team member performance

### **Resources**

(include websites, industry associations, trade publications and other resources used by client)