



Trusted Advisors to the Legal Profession

14 Ways to Use Client Journey Mapping in Your Firm

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1. Lawyer Retreat

Using the format and techniques we employed during the conference, you can either ask your own clients to act as facilitators, or you can identify other in-house counsel who will facilitate the sessions. Consider providing basic journey mapping training in advance so that you can complete the exercise during the retreat within a few hours.

2. Client Team Exercise

Using a combination of client feedback and the team's knowledge of the client's matters, you can lead the team in an exercise to create a journey map. You can also invite the client to participate in the exercise. When new members join the team, consider taking them through the maps as well. Review the maps on an annual basis to determine whether additional improvements can be made.

3. Practice Group Exercise

Using an amalgam of feedback from several clients across the practice, you can lead a practice group in an exercise to create a journey map that may help to identify trends in client experiences. As with the client team exercise, consider reviewing the maps regularly, and share the maps with new members of the practice group.

4. Client Interview Aide

In order to gain even more valuable feedback, you can ask more granular questions during the course of client interviews that will help you to complete the map. You can also consider sharing the tool with the client prior to the interview.



5. Client Presentation Worksheet

The next time you invite a client or any in-house counsel to your firm to speak with the lawyers, consider providing the worksheet and some initial instructions in advance, so that they can try to fill it out during the course of the presentation. It may lead your lawyers to be more engaged and ask more interesting and thought-provoking questions, leading to a closer client relationship.

6. Associate Secondment Tool and Debrief Exercise

If your firm secondments associates to your clients, consider providing some advance training in client journey mapping. Ask them to complete the map during their secondment. To benefit even further, ask them to take the client team through the map and discuss bright spots and areas for improvement.

7. Associate Training Exercise

You can use the materials to create an associate training program to improve their focus on the client experience. Rather than expecting clients to participate in-person, consider creating case studies and having partners or marketing people play the part of the client.

8. Project Management/Marketing Joint Exercise

For those firms that have invested in a project management function, you should consider teaming up with the project management group to use client journey mapping as an aide to their work. Client journey mapping and process mapping are similar, and engaging together can add value to both groups' efforts.

9. Client Intake Process

Consider including this process in the initial discussions lawyers have with their clients. It will help to set expectations and may uncover potential misunderstandings that can be addressed earlier in the course of the matter. It will also impress the client that your firm is committed to serving them well.

10. Lateral Intake Process

Consider including this process in the initial discussions lawyers have with potential laterals. Laterals are one of the most expensive investments a firm makes. This process could uncover issues and possible mismatches early in the consideration stage. It can also provide the template and agreement for rollout priorities once the lateral joins the firm.



11. Proposal Aide

Consider using client journey mapping techniques when you are constructing your RFP or proposal response. It could provide you with a template for the kinds of questions you may need to ask in order to better address their needs. It could also be used as evidence that you understand what's important to them and want to engage in up-front planning.

12. Marketing Function Evaluation Tool

Turn this exercise on its head. Imagine that instead of listening to in-house counsel describe what it's like to work with a law firm, you used this tool to hear partners describe what it's like to try to get something marketing-related done within your firm. You may find the exercise enlightening, and it will inspire ideas that will help you improve their experience working with your department.

13. Marketing Project/Campaign/Event Evaluation Tool

Use the journey mapping exercise to help improve your client-facing activities and projects. These can range from planning for a client event to the development of a website.

14. Vendor Training Tool

If we put this exercise through another lens, we can imagine applying it to our own vendors. Consider taking vendors through this exercise so that they can understand your point of view and your experience working with them so that they can better serve you. You can even incorporate this technique into an RFP process by taking potential vendors through the exercise with you.