



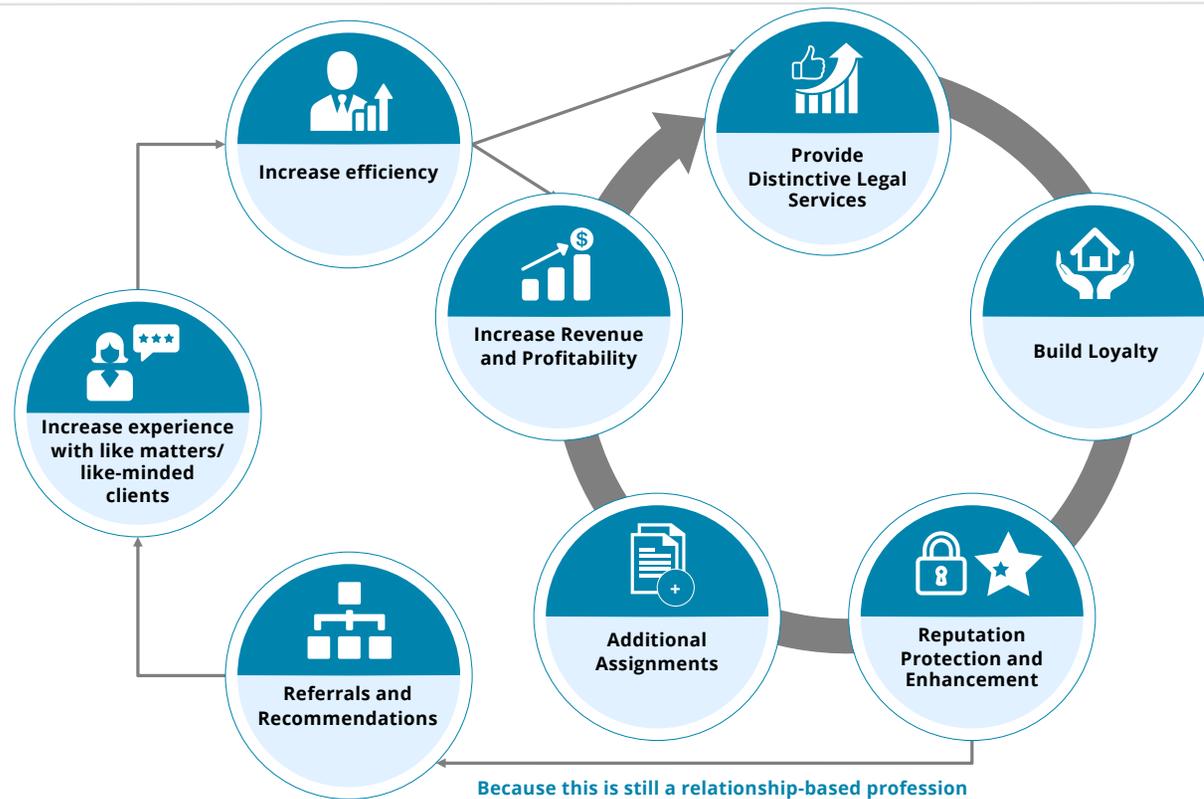
Trusted Advisors to the Legal Profession



Client Journey Mapping Interactive Workshop

Yolanda Cartusciello
March 21, 2022

THE TRADITIONAL BUSINESS DEVELOPMENT CYCLE



WHAT THE CLIENT VALUES – A FRAMEWORK BY ROBERT WOODRUFF



“Driven by more demanding clients, global competition, and slow-growth economies and industries, many organizations search for new ways to achieve and retain a competitive advantage.”

Past attempts have largely looked internally within the organization for improvement



WHAT THE CLIENT VALUES – A FRAMEWORK BY ROBERT WOODRUFF



“ The next major source for competitive advantage likely will come from **more outward orientation toward clients**, as indicated by the many calls for organizations to compete on superior client value delivery

”
Customer Value: The Next Source for Competitive Advantage Journal of the Academy of Marketing Science, 1997

THE CURRENT LEGAL INDUSTRY ENVIRONMENT



“

...we asked in-house counsel whether their company had dismissed a law firm in the past two years and, if they had, what the reasons were for ending the relationship.

Forty- five percent said they had dismissed firms [in the last two years].

”

*“Momentum – The Annual Survey of In
The House Members”
In The House, February 2017*

IS THIS AN OPPORTUNITY?



“

A counsel at a mega-billion dollar company in California summed up his prescription rather simply: “I sometimes wish every outside lawyer had to spend a year working in-house before becoming a partner at his or her firm.”

”

*“Momentum – The Annual Survey of In
The House Members”
In The House, February 2017*



What kind of experience are you
giving your clients?

THIS MIGHT SEEM LIKE A NON-SEQUITOR

Menu



Search the menu

Advance Care Planning

Billing

Account Summary

Estimates

Billing Inquiries

Billing FAQ

Insurance

Insurance Summary

Coverage Details

Sharing

Share My Record

Share Everywhere

Link My Accounts

Lucy

Resources

Research Studies

Estimates

Prepared Estimates

These estimates have been confirmed or prepared for you by our staff. Select an estimate for more details.

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WITH BIOPSY

\$700 (your estimated payment)

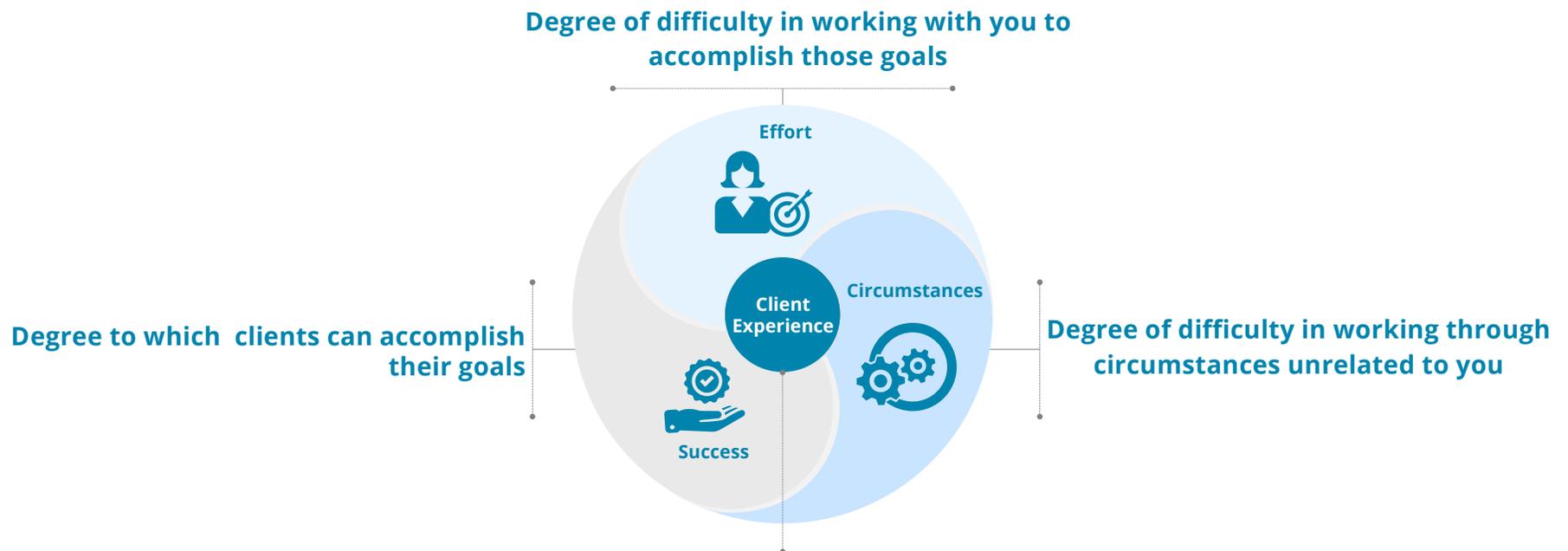
NYU Tisch Hospital

Reference #814241

Created 1/3/22

View letter

DEFINITION OF THE CLIENT EXPERIENCE



The perception that clients have of their interactions with an organization

THE CLIENT EXPERIENCE – THE ISSUE



“

The siloed nature of service delivery ... can affect, impede and even undermine the client experience and the long-term relationship with the client.

”

*“The Truth About Customer Experience”
Harvard Business Review, September 2013*



DIGGING DEEPER



Offerings



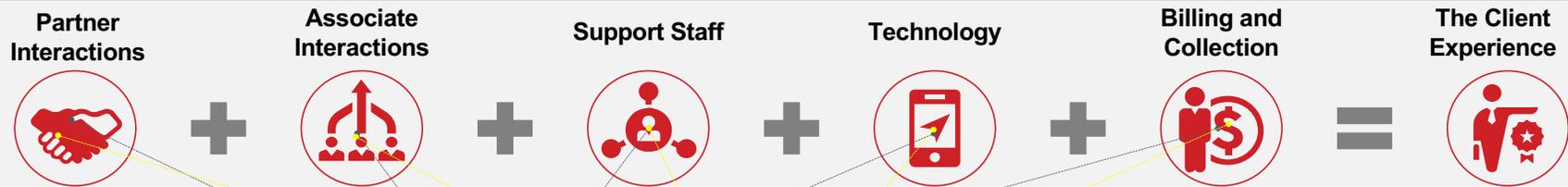
Functional Elements of the Experience



Offerings



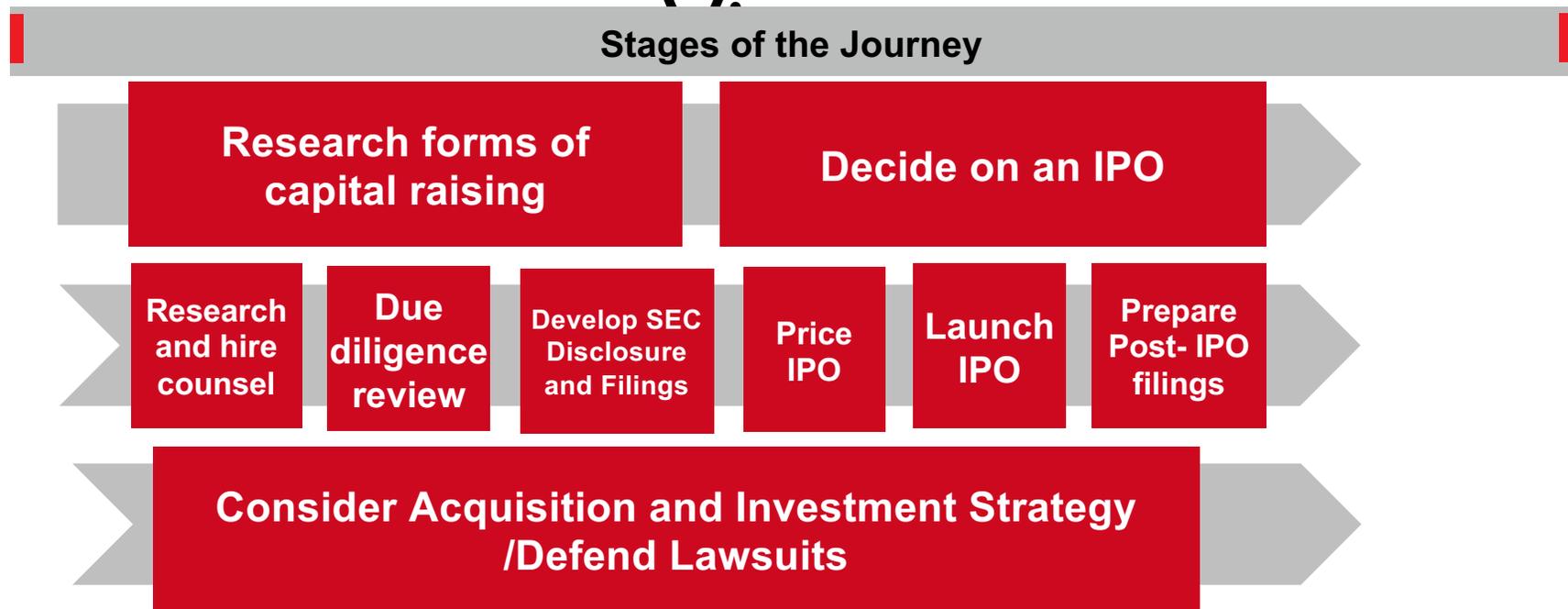
Functional Elements of the Experience



Stages of the Journey



Client Journey Mapping – The Journey From the Client’s Point of



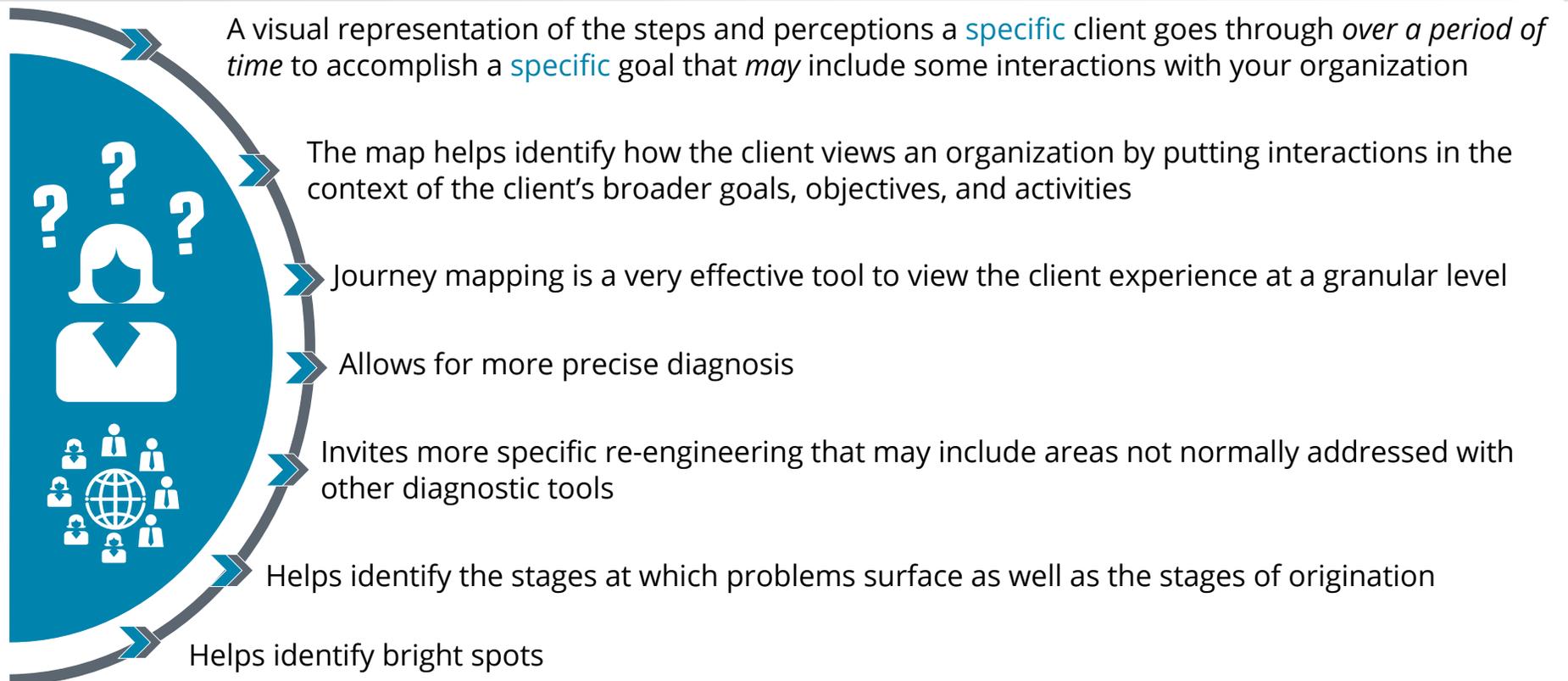
THE CLIENT EXPERIENCE – DIAGNOSTIC TOOLS





What Is Client Journey Mapping and How Can It Help?

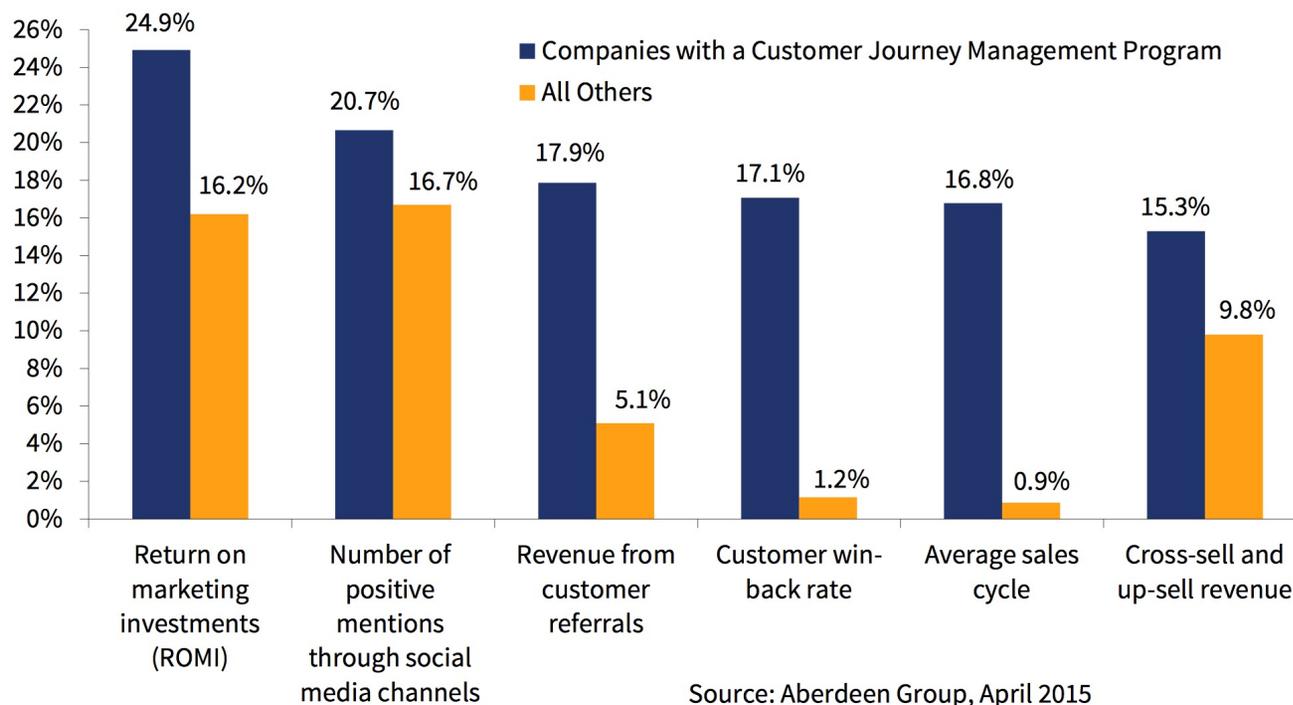
WHAT IS A CLIENT JOURNEY MAP?



DRIVING ACTIONS FROM CLIENT JOURNEY MAPPING



THE FINANCIAL CASE FOR A CLIENT-FOCUSED FIRM



“It’s important to note that the performance results depicted provide an illustration of the benefits of adopting a formal journey management program.”
Aberdeen Group



Why Does It Work?

...
BECAUSE IT RELIES ON STORIES

2



**...stories
 break down
 defenses**

Everyone loves a good story



Stories make us...

Authentic
Personable

Relatable
Inspiring



What Does the Map Look Like?
How Do I Create It?

MAPS TAKE VARIOUS FORMS



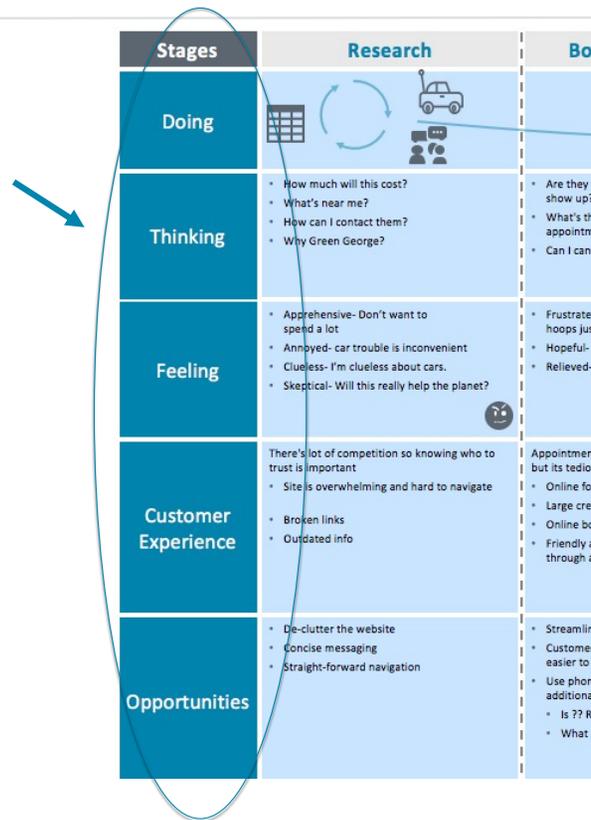
Stages	Research	Book Appointment	Arrive and Check In	Wait During Servicing	Check Out	Follow-up
Doing						
Thinking	<ul style="list-style-type: none"> How much will this cost? What's near me? How can I contact them? Why Green George? 	<ul style="list-style-type: none"> Are they flexible? Can I just show up? What's the fastest way to book an appointment? Can I cancel or reschedule? How? 	<ul style="list-style-type: none"> Is it easy to find and get there? Where do I park? Where do I go? Who do I talk to? How long will the wait be? How much will this cost? 	<ul style="list-style-type: none"> What can I do while I wait? Would I rather wait here or come back later? Will it be done on time? How will I know? Can I watch what they are doing to my Car? How is my service eco-friendly? 	<ul style="list-style-type: none"> Will a mechanic tell me exactly did they did? Will I understand what s/he is telling me? What is cost breakdown? Are there other tips for maintaining my car? 	<ul style="list-style-type: none"> Where is my car? Is it in the same spot? When will I need to bring my car in again? What requires mechanic, and what can I do on my car?
Feeling	<ul style="list-style-type: none"> Apprehensive- Don't want to spend a lot Annoyed- car trouble is inconvenient Clueless- I'm clueless about cars. Skeptical- Will this really help the planet? 	<ul style="list-style-type: none"> Frustrated-don't want to jump through so many hoops just to get an appointment Hopeful- I hope I got the time I want Relieved- Now that the appointment is set 	<ul style="list-style-type: none"> Anxious- If I'm late, will they still take me? Uncertain- Am I in the right place? This looks different than other auto shops Annoyed-Car trouble in inconvenienced, but it has to get done 	<ul style="list-style-type: none"> Surprised- It's spacious and comfortable. Bored- No magazines/TV? But there's Wifi. Skeptical- Is all this green Stuff for real? Impatient- How much longer will this take? 	<ul style="list-style-type: none"> Relieved- Its finally done! Relieved- The cost is as expected. Disappointment- Didn't meet my mechanic? Clueless- Don't understand what they did 	<ul style="list-style-type: none"> Hopeful- Will my car run better? Optimistic- Does my car feel any different? Cautions- Are they going to spam my inbox?
Customer Experience	<p>There's lot of competition so knowing who to trust is important</p> <ul style="list-style-type: none"> Site is overwhelming and hard to navigate Broken links Outdated info 	<p>Appointments can be booked by phone or online but its tedious Either way</p> <ul style="list-style-type: none"> Online form asks for a lot of information Large credit car image at the top is alarming Online booking still requires email and phone Friendly attendant on the phone, but have to go through automated voice first 	<p>Check-in is fast and friendly but it doesn't feel like the car is getting hugged.</p> <ul style="list-style-type: none"> No acknowledgement of first-time customer Phone ringing constantly and loudly Customer not informed that check-up is included with oil change, until he asked. 	<p>Waiting area is more comfy than most but reading product and green facts gets old fast.</p> <ul style="list-style-type: none"> Artifacts are not relevant to my service No indication of my estimated completion No entertainment No acknowledgement from staff 	<p>Checkout is fast and painless but it doesn't inspire a huge desire to return.</p> <ul style="list-style-type: none"> Knowledge and passion only came after prompting. No clear breakdown of what was done, how it saves money, or planet No reason to stay connected between visits 	<p>GG is on social networks but there's no reason to stay connected between visits</p> <ul style="list-style-type: none"> Need better reminder than a sticker Emailed receipt is a deed end. Nothing to share or connect with my newly green-tuned car
Opportunities	<ul style="list-style-type: none"> De-clutter the website Concise messaging Straight-forward navigation 	<ul style="list-style-type: none"> Streamline appointment form and process Customer profiles so repeat appointments are easier to set Use phone for gathering additional details <ul style="list-style-type: none"> Is ?? Required? What is going on with the car? 	<ul style="list-style-type: none"> Display signage for parking. Identify if customer is now or returning(for support) Acknowledgement green thinking in conversation. Provide a menu of services with prices Acknowledge both local amenities. Maps would be helpful 	<ul style="list-style-type: none"> Provide status updates. Simplify the display of the artifacts More staff information. Its good to hear from staff who are passionate about sustainability. Space is too open- differentiate between public and private spaces 	<ul style="list-style-type: none"> Give highlights and direct them to their profile for more details about what was done Empower customers to visit the site to increase their ?? Show price comparisons for different parts: GG vs. average auto stop 	<ul style="list-style-type: none"> In the car service documentation, include diagrams and user-friendly terms Follow-up and build a relationship: how customer helped the environment with Green Garage, tips for the car, reminders, and invitations to special events. Customer profiles for long-term relationship, and record keeping, easier appointments

MAPS TAKE VARIOUS FORMS



Stages	Research	Book Appointment	Arrive and Check In	Wait During Servicing	Check Out	Follow-up
Doing						
Thinking	<ul style="list-style-type: none"> • How much will this cost? • What's near me? • How can I contact them? • Why Green George? 	<ul style="list-style-type: none"> • Are they flexible? Can I just show up? • What's the fastest way to book an appointment? • Can I cancel or reschedule? How? 	<ul style="list-style-type: none"> • Is it easy to find and get there? • Where do I park? • Where do I go? Who do I talk to? • How long will the wait be? • How much will this cost? 	<ul style="list-style-type: none"> • What can I do while I wait? • Would I rather wait here or come back later? • Will it be done on time? How will I know? • Can I watch what they are doing to my Car? • How is my service eco-friendly? 	<ul style="list-style-type: none"> • Will a mechanic tell me exactly did they did? • Will I understand what s/he is telling me? • What is cost breakdown? • Are there other tips for maintaining my car? 	<ul style="list-style-type: none"> • Where is my car? Is it in the same spot? • When will I need to bring my car in again? • What requires mechanic, and what can I do on my car?
	<ul style="list-style-type: none"> • Apprehensive- Don't want to spend a lot • Annoyed- car trouble is inconvenient 	<ul style="list-style-type: none"> • Frustrated-don't want to jump through so many hoops just to get an appointment • Hopeful- I hope I got the time I want 	<ul style="list-style-type: none"> • Anxious- If I'm late, will they still take me? • Uncertain- Am I in the right place? This looks different than other auto shops 	<ul style="list-style-type: none"> • Surprised- It's spacious and comfortable. • Bored- No magazines/TV? But there's Wifi. • Skeptical- Is all this green stuff for real? 	<ul style="list-style-type: none"> • Relieved- Its finally done! • Relieved- The cost is as expected. • Disappointment- Didn't meet my mechanic? 	<ul style="list-style-type: none"> • Hopeful- Will my car run better? • Optimistic- Does my car feel any different? • Cautious- Are they going to scam my money?

MAPS TAKE VARIOUS FORMS

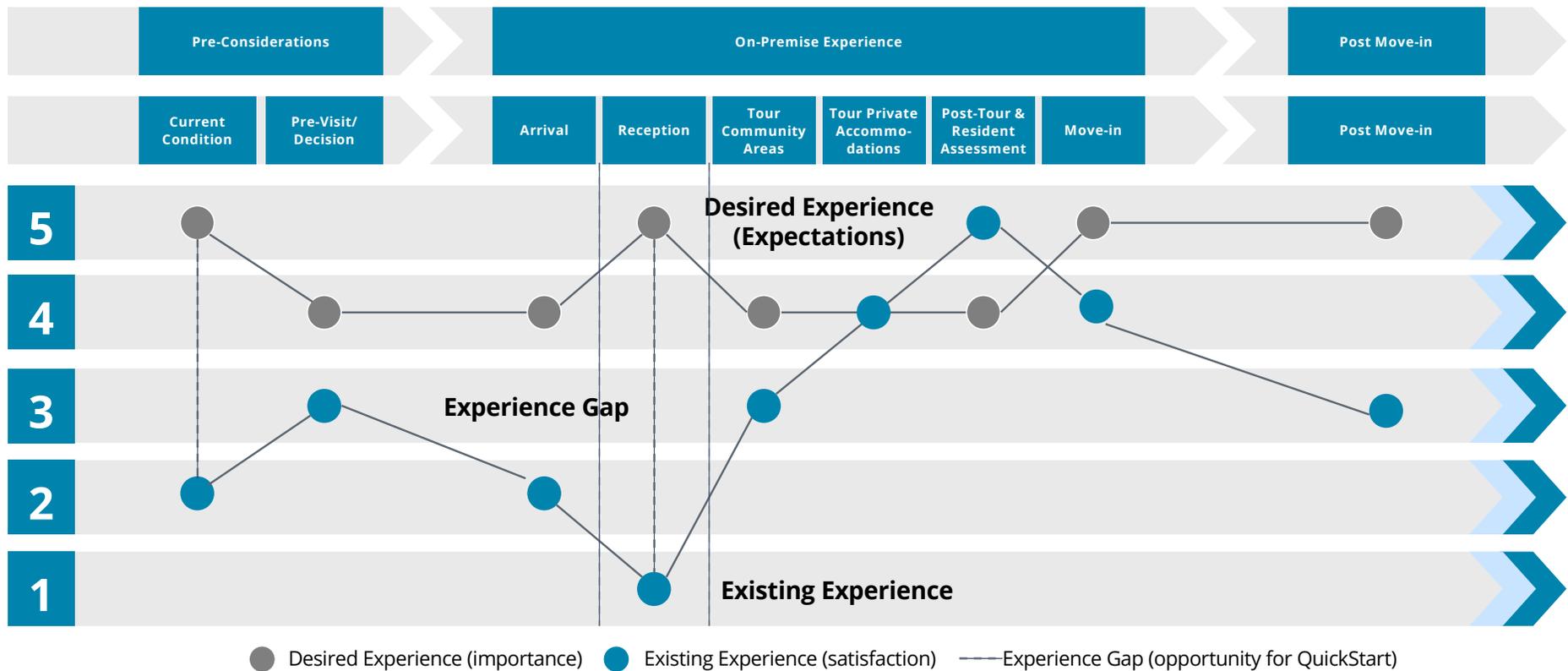


MAPS TAKE VARIOUS FORMS



Stages of Journey	Target Customer	Journey Description						
	Donna Redding, Suburban Mom	Take the family on a vacation						
Icon	Icon	Icon	Icon	Icon	Icon	Icon	Icon	Icon
Desire for Travel	Explore Options	Select Vacation	Book Travel	Schedule Meals and Events	Travel to Location	Experience Vacation	Travel Home	Remember Experience
Goal of persona for stage								
Identify when the family can take a vacation this year	Get a sense of destinations and costs	Pick itinerary the fits timing, budget, and family interests	Book flights, hotel, airport transfers quickly and easily	Pre-plan some meals and activities that the family will enjoy	Have a smooth trip to our destination	All bookings happen as planned. Have fun with my family.	Have a smooth trip back to our home	Capture and share our vacation with family and friends
Steps that do not include your company								
<ul style="list-style-type: none"> Find out about school vacations Find out about family events 	<ul style="list-style-type: none"> Discuss with family and friends Read magazines Review online travel sites 	<ul style="list-style-type: none"> Discuss with husband and kids Review other travel review sites 	<ul style="list-style-type: none"> Confirm high dollar online purchase with credit card company Order travel guide from Amazon 	<ul style="list-style-type: none"> Talk to family about what they want to see and do while on vacation. Review family travel blogs. 	<ul style="list-style-type: none"> Pack for family Print boarding passes Travel to airport Fly to destination 	<ul style="list-style-type: none"> Make additional reservations for dinner and activities Post updates on FB Have FUN 	<ul style="list-style-type: none"> Pack up family Check out of hotel Travel to airport Fly home 	<ul style="list-style-type: none"> Download and share pictures with friends and family in online album Make photo scrapbook
Steps that include your company								
	<ul style="list-style-type: none"> Review website Sign-up for email list Like Facebook page 	<ul style="list-style-type: none"> Review website for details of desired options Review "fine print" policies 	<ul style="list-style-type: none"> Book flight, hotel and airport transfers at prices that matched search 	<ul style="list-style-type: none"> Book dinner reservations and interesting tours/outings near hotel. 	<ul style="list-style-type: none"> Provide assistance when flight is delayed and connection is at risk 	<ul style="list-style-type: none"> Send reminders of bookings Resolve any discrepancies with bookings 	<ul style="list-style-type: none"> Provide assistance when flight is delayed and connection is at risk 	
Persona's expectations for stage								
	Compare prices of different destinations and packages. See reviews from other families like ours.	Compare prices for flight and hotel options at desired locale. Understand terms and conditions.	That prices at time of booking match online quote. Process is quick and easy. Confirmation email received promptly.	Feel confident about the quality of the restaurants and tour operators prior to booking.	Travel agency keeps me up to date on status of flights and handles rebookings when connection is missed	Trip goes smoothly and all reservations booked online happen as scheduled and described.	Travel agency keeps me up to date on status of flights and handles rebookings when connection is missed	Share the great experiences from our trip with family and close friends. Create memento of our trip.
Key obstacles/issues for persona								
	Can only review one destination or package at a time. Can't save options to review later.	Can only review one combination of flights/hotel at a time. T&Cs are legalese."	None to report	Confirmations for bookings came from agency, not local companies. Feeling a little worried.	Agency is out of the loop and airline is limited in rebooking due to online agency origin.	None to report	Agency is out of the loop and airline is limited in rebooking due to online agency origin.	Hard to find the best platform to share vacation pictures-social media or private online album

MAPS TAKE VARIOUS FORMS



Source: Bedrock Consulting

FOR TODAY'S EXERCISE



To facilitate the learning experience, we will:



Work in smaller groups



Focus on real examples

- Work with your assigned case study OR if there is someone at your table from a law firm, you can ask them to tell you a story



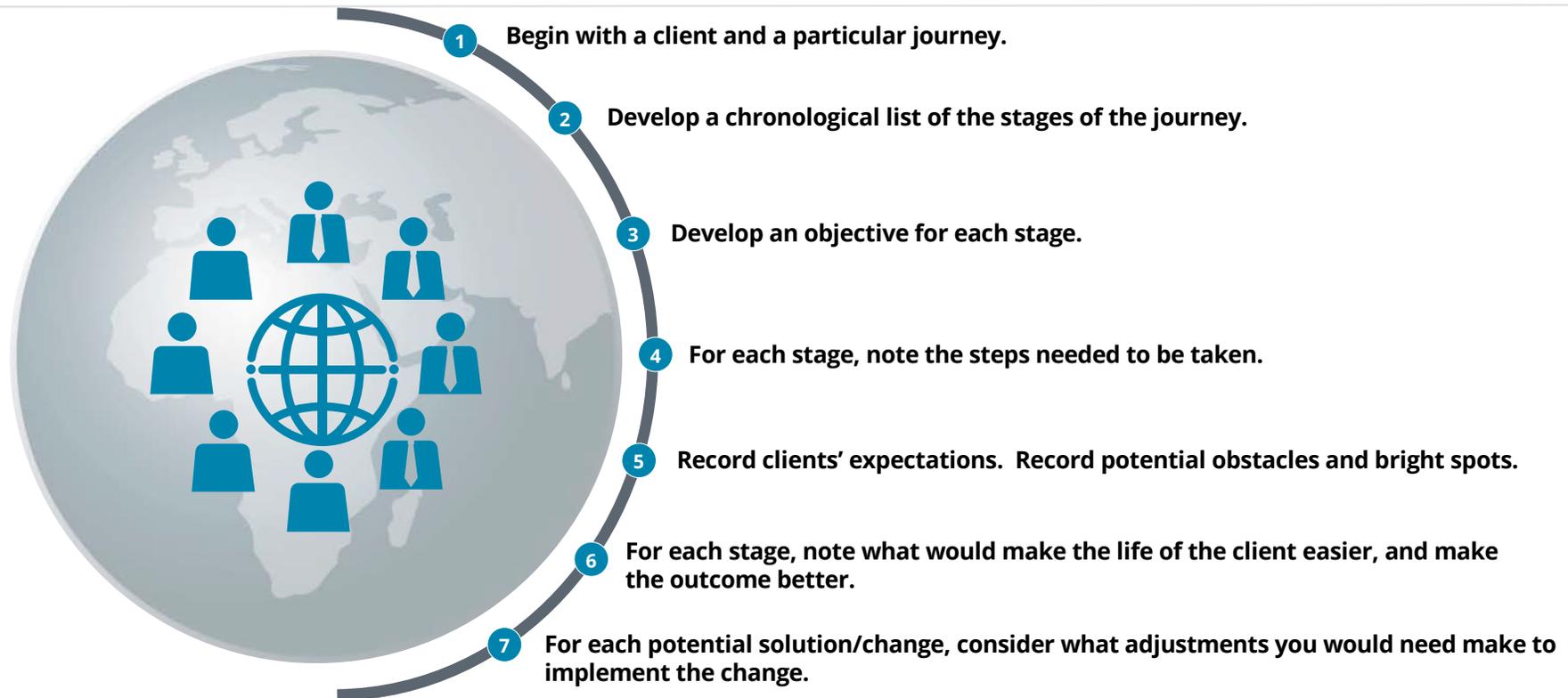
Reduce a complete journey to a specific matter



Focus on specific stages of the journey

- Although the first introduction to a law firm is important, we will start the journey mapping exercise assuming that you're getting hired to work on a search
- Although the invoicing at the end of the matter is important, we will end the journey prior to any fee resolutions that may take place at the end of the placement

SEVEN STEPS OF CLIENT JOURNEY MAPPING EXERCISE



STEP ONE – THE CLIENT AND THE MATTER



Target Client

Dana Smith, Pharmaceuticals GC



Matter Description

Class action lawsuit brought by employees re: OSHA standards

Stages of Journey



... ..

Persona's Goal for Stage

- ...
- ...
- ...
- ...
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- ...

What Steps Do NOT Include Your Company?

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- ...

What Steps Include Your Company?

- ...
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- ...
- ...

What Does Persona Expect?

- ...
- ...
- ...
- ...
- ...
- ...
- ...
- ...

STEP TWO – THE CHRONOLOGICAL STAGES



Target Client

Dana Smith, Pharmaceuticals GC



Matter Description

Class action lawsuit brought by employees re: OSHA standards

Stages of Journey



Inform CEO of lawsuit



Select Counsel and PR Agency



Develop Strategy; present to CEO/Board



Adjust budgets, contingency plans



Develop settlement strategy



Develop Trial Strategy



Develop new internal protocols



Settle suit and pay lawyer's fees

Persona's Goal for Stage

▪ ...

What Steps Do NOT Include Your Company?

▪ ...

What Steps Include Your Company?

▪ ...

What Does Persona Expect?

▪ ...

What Are the Key Issues or Obstacles?

▪ ...

STEP THREE – THE OBJECTIVES



Target Client

Dana Smith, Pharmaceuticals GC



Matter Description

Class action lawsuit brought by employees re: OSHA standards

Stages of Journey



Inform CEO of Lawsuit



Select Counsel and PR Agency



Develop Strategy; present to CEO/Board



Adjust budgets, contingency plans



Develop settlement strategy



Develop Trial Strategy



Develop new internal protocols



Settle suit and pay lawyer's fees

Persona's Goal for Stage

▪ ...

▪ ...

▪ Provide CEO and Board with best option(s) to settle matter expeditiously

▪ ...

▪ ...

▪ ...

▪ ...

▪ ...

What Steps Do NOT Include Your Company?

▪ ...

▪ ...

▪ Provide CEO and Board with best option(s) to settle matter expeditiously

▪ ...

▪ ...

▪ ...

▪ ...

▪ ...

What Steps Include Your Company?

▪ ...

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What Does Persona Expect?

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What Are the Key Issues or Obstacles?

▪ ...

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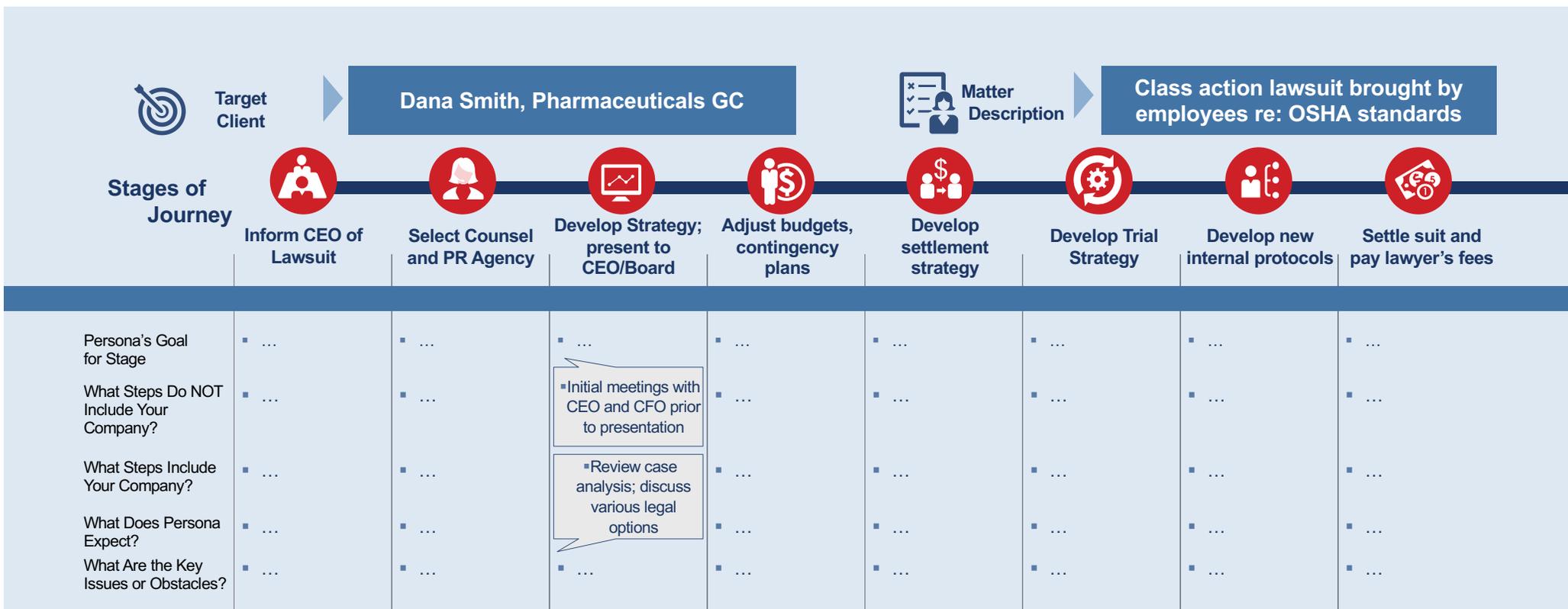
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STEP FOUR – MAIN STEPS IN EACH STAGE



STEP FIVE – EXPECTATIONS AND OBSTACLES



What might get in the way of meeting expectations?



Target Client

Dana Smith, Pharmaceuticals GC



Matter Description

Class action lawsuit brought by employees re: OSHA standards

Stages of Journey



Inform CEO of Lawsuit



Select Counsel and PR Agency



Develop Strategy; present to CEO/Board



Adjust budgets, contingency plans



Develop settlement strategy



Develop Trial Strategy



Develop new internal protocols



Settle suit and pay lawyer's fees

Persona's Goal for Stage

▪ ...

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▪ ...

What Steps Do NOT Include Your Company?

▪ ...

▪ ...

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What Steps Include Your Company?

▪ ...

▪ ...

▪ Practical advice that takes into account business objectives

▪ ...

▪ ...

▪ ...

▪ ...

▪ ...

What Does Persona Expect?

▪ ...

▪ ...

▪ Outside counsel at odds with GC's perspective; no real precedent for success of high-risk approach GC favors

▪ ...

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What Are the Key Issues or Obstacles?

▪ ...

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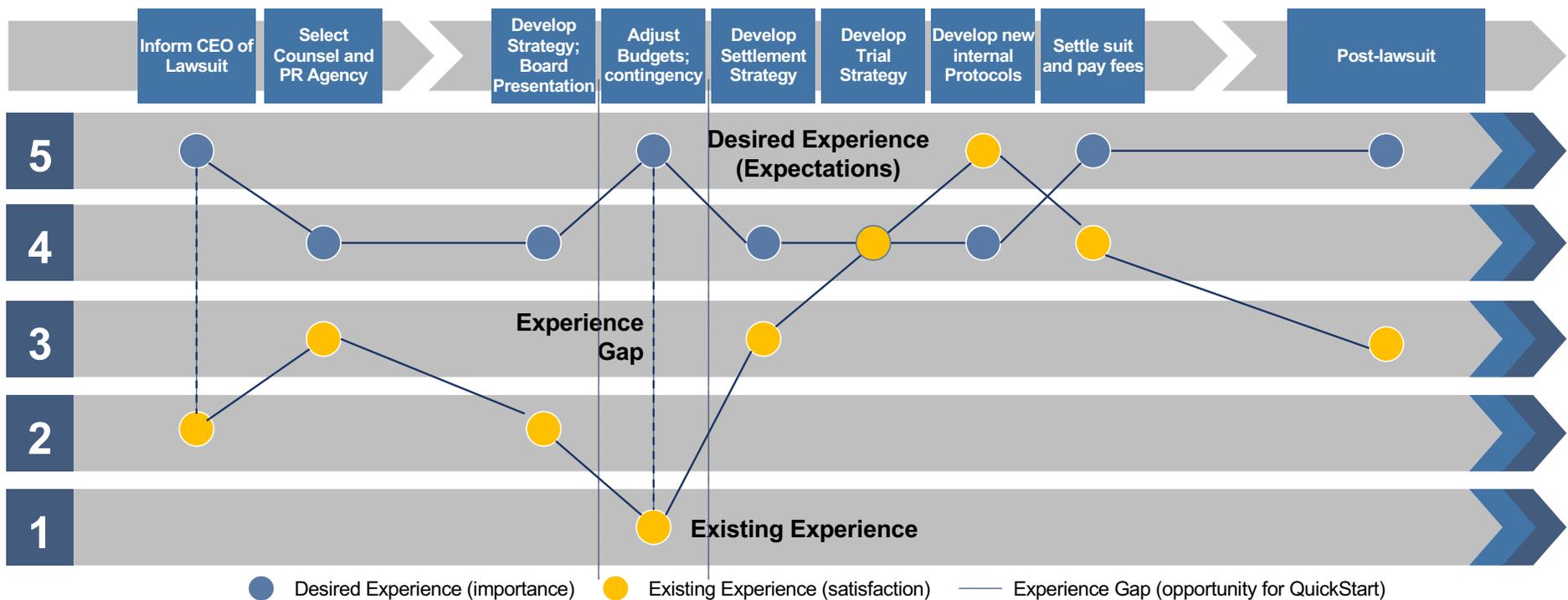
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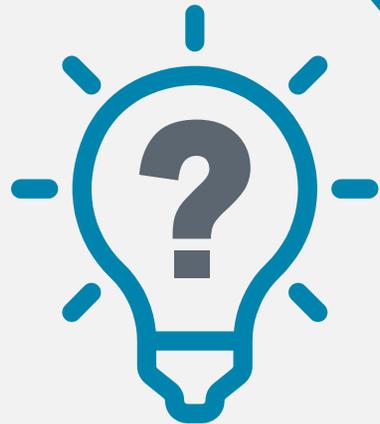
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STEP SIX – PLOTTING THE GAPS



STEP SIX – BRAINSTORM SOLUTIONS



» **What would improve the client experience?**

- Communication
- Process
- Technology

» **What is being done very well and should be replicated elsewhere?**

Why is something working? A mindset of an individual, a particularly good process?

STEP SEVEN – CHANGES/BRIGHT SPOTS



» **What changes would I need to make?**

If you could completely disregard the current structure and build anew, what would you do to address the issues uncovered?

» **How can we take the ideal and make it real?**

TABLE DISCUSSION



Complete Steps 2-4 in
your working groups

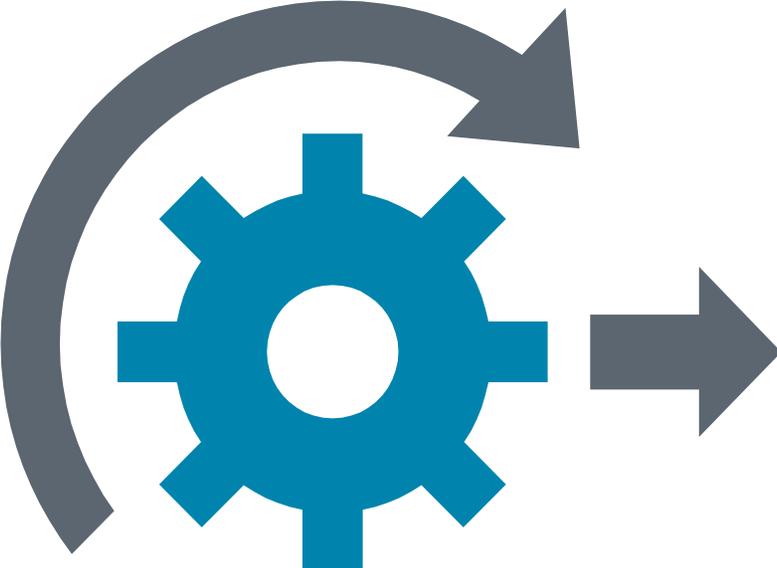


Complete the plotting map



Work together with your assigned case study to
brainstorm what a better experience might look
and at what stages improvements should be
made

REVIEW OF JOURNEY MAP PROGRESS



AN EFFECTIVE TOOL TO HELP CHANGE BEHAVIOR



**Journey mapping
engages people in
your organization**



**It should include
client involvement**



**Impediments
and bright spots
become apparent**

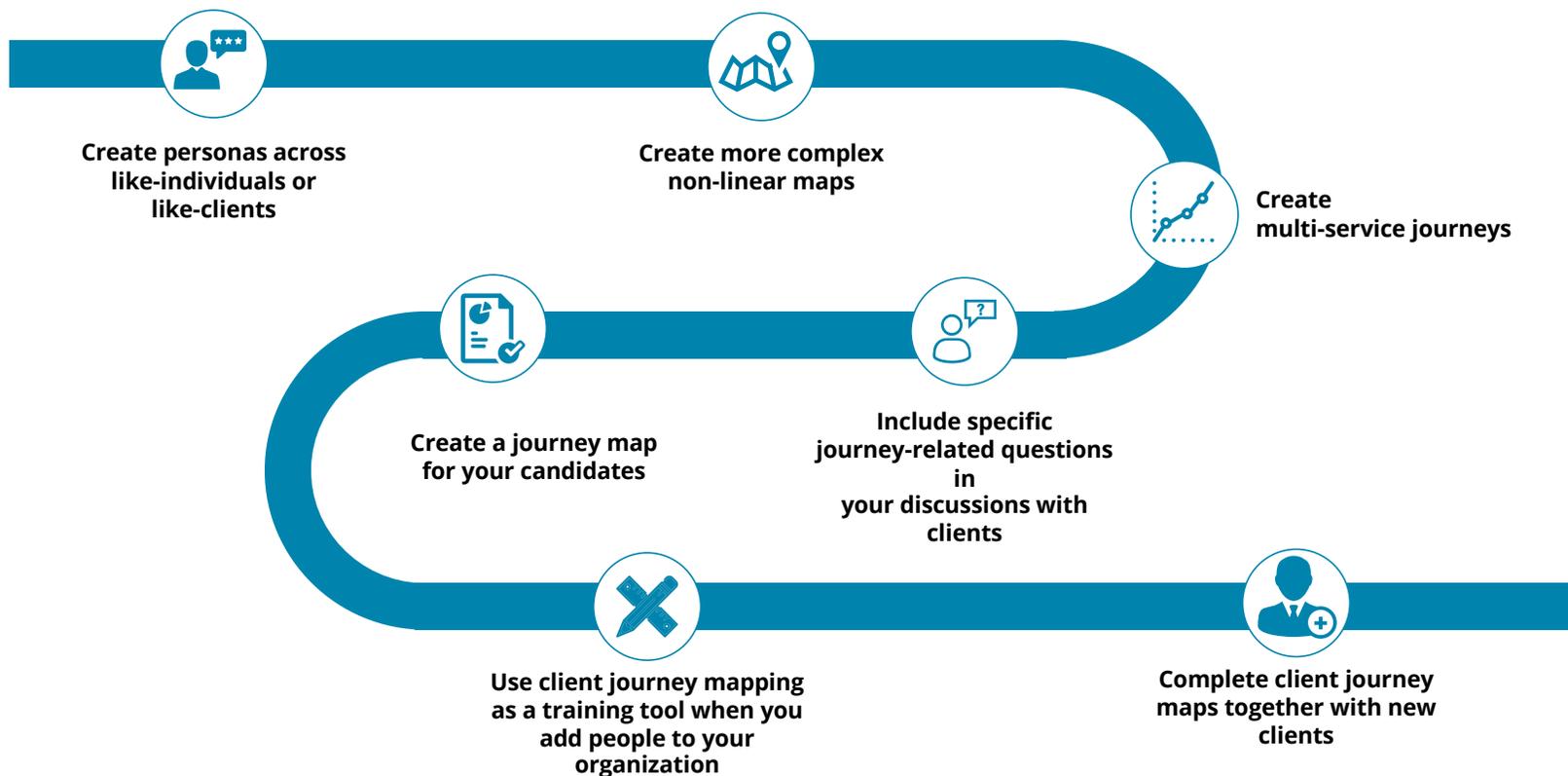


**Solutions begin to
form organically**

“When you engineer early successes, what you’re really doing is engineering hope. Hope is precious to a change effort.”

Switch: How to Change Things When Change is Hard

TO BENEFIT EVEN FURTHER



CLOSING THOUGHT



“

Optimizing a single customer journey is tactical; shifting organizational processes, culture, and mind-sets to a journey orientation is strategic and transformational. It creates a culture that’s hard to build otherwise, and a true competitive advantage goes to companies that get it right.

”

*“The Truth About Customer Experience”
Harvard Business Review, September 2013*