Ep #108: The Client Journey Map: A Systems Tool for Better Client Experience and Law Firm Flow [Agile Lawyering Part 8]

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With Your Host

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I've encountered a lot of law firms over the years that place a tremendous value on being responsive to client communications or requests. They'll even have policies like, we need to respond to all client calls and emails before the end of the day, or sometimes even more aggressive timelines.

But responsiveness can be the death of productivity. And over-indexing on responsiveness is yet another way that practices fall into the urgency trap I've been talking about the past few weeks. And besides, a significant chunk of those urgent client inquiries aren't actually urgent. They're a version of failure demand. It's work that only exists because something wasn't handled well somewhere upstream.

A lot of that anxiety-driven client communication is completely preventable if the client understands the roadmap for the journey they're on with you for resolving their legal issue. Today I'm going to show you how to draw that client journey map and turn it into a tool that simultaneously solves a whole range of problems in your practice.

You're listening to *The Agile Attorney Podcast*, powered by GreenLine. I'm John Grant, and it is my mission to help legal professionals of all kinds build practices that are profitable, sustainable, and scalable for themselves and the communities they serve. Ready to become a more Agile Attorney? Let's go.

A quick note. The concepts I'm gonna talk about today should be useful to you no matter what kind of practice you're part of or what tools you use. If you'd like, stay tuned at the very end where I will briefly discuss how my software tool GreenLine helps support and reinforce the Agile practices from today's episode.

Hey everyone, welcome back. So we're on the downhill stretch for this Agile Attorney 101 series and as I promised at the end of last week's episode, I'm going to use today's episode to shift our frame of reference.

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The bulk of the concepts I've discussed so far have focused on helping law practices that are having trouble keeping up with their delivery commitments, right? Experiencing that overwhelm.

And I've given you a lot of concrete ideas on how to improve your internal policies and behaviors and ultimately your mindset to reduce overwhelm, to improve consistency and predictability, and ultimately get to where you and your team can comfortably and sustainably deliver quality work faster and at a higher volume.

Now, all of that, every episode so far in this series has been focused inward primarily, on you, on your team, on your internal processes. And that's intentional because it's hard to build capacity when you're already drowning in work. So my purpose has been to help get your practice from that roiling boil down to more of a gentle simmer. But now that we've started to stabilize things, hopefully you've got some breathing room and you feel like you can step back to look at the bigger picture.

Last week I mentioned that cycle time can be a rough proxy for client experience, but it's really just one data point. If we want to build a practice that truly serves our clients well, and honestly that's the whole point of having this promise keeping machine in the first place, we need to understand the full client journey.

So we've been managing the work and not the worker, and now let's make sure the work we're managing is actually aligned with what the client needs.

And I want to start with a simple question. What are clients actually looking for when they reach out for professional legal help? First off, I think it's worth stating that by the time a person contacts a lawyer, the problem they're dealing with has to be significant enough to overcome their natural fear and hesitation about working with a lawyer in the first place.

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If you haven't noticed, the world is sort of culturally predisposed against us. Sometimes for good reason, and especially on how expensive it can be to engage our help. So it's a pretty high bar.

Now, once they do reach out, I like Professor Daniel Katz's formulation that legal clients have two and only two practical needs that they're looking to solve for. They're trying to mitigate risk and they're trying to navigate complexity. That's it. That's the job.

But even within those two things, I'd argue that lawyers tend to over-index on the risk mitigation part. It's where we've been trained to think, it's where our expertise lives. It's saying to the client, here's what could go wrong and here's how I can help protect you. And I think we lead with risk because that's really what law school teaches us to spot.

But the client's lived experience of their legal problem is overwhelmingly one of complexity, not just risk. They're drowning in unfamiliar processes, confusing terminology, competing deadlines, and decisions they don't feel well-equipped to make. The risk is absolutely real, but the complexity is what they feel every day. They don't know what they don't know and they don't know what's supposed to happen next.

Then alongside those two practical needs, there are three social-emotional needs that also come into play. It's simply human nature when people encounter risk and complexity to do these things. I describe them as seeking wisdom, advice, and consortium. The wisdom comes first, the information seeking.

People want to get smarter about the problem that they're facing and this usually starts well before they even call you. I sometimes call it typing into the Google confessional, although more and more they're probably turning to AI now too. But by whatever means, people are trying to better understand their situation.

But then because there is a lot of information available and a lot of it can be contradictory, the next thing people seek is advice. They want someone with experience to tell them what they should do. And lawyers are actually really good at this, right? It's the core of what law school teaches us. Listen to the fact pattern, apply your knowledge of the law, give direction.

But third, and this is the one that I think we too often give short shrift, people seek consortium. They want to feel like someone is in this with them, not just dispensing advice from on high, but really, if not walking alongside them, at least being there for them through an unfamiliar and stressful process.

And like I said, I think most lawyers tend to over-deliver on the practical side, especially the risk piece, and under-deliver on the social emotional side. We become great legal technicians because we miss the bedside manner, and that manner is important for a number of reasons.

Starting with the fact that clients are often unreliable narrators about what they actually find valuable because they're not used to working with lawyers. There isn't a lot of psychological safety in the early phases of the relationship, which means we have to put in real effort to develop that rapport.

One other high-level thing to keep in mind. Every single interaction you have with a client or a potential client is a value exchange. And I don't just mean the big transaction, I mean every interaction from the intake form to the final document delivery.

And I've defined value as the benefit someone receives minus the investment they put into something. And yes, it involves money, but it's also made up of time and effort and emotional energy and a whole host of other things. And we need to recognize that everything we ask a client to invest needs to be clearly tied to some benefit they will receive. Ideally a reciprocal one and an immediate one.

And thinking about those microtransactions is core to the key point I want to make in this episode and that's the importance of understanding and eventually proactively designing the journey your client will take as you help them work through their particular legal problem.

And yes, that includes the big picture goals for their overall matter, but it's also about understanding each of those micro-interactions you'll have with them along the way and how those interactions serve both as a step towards the big picture goal and also how they stand on their own as an exchange of value that meets an immediate client need. And that immediate need is often less about risk and more about navigation, information, and consortium.

And before I get to the full client journey map, I do want to call out this mental shortcut that a lot of lawyers and law practice leaders take when thinking about client experience. Instead of looking at the entire value, they tend to fixate on one thing, and that's responsiveness. And this is where they say never let a client email or phone call go more than X hours without a response.

And you know, I've seen firms try to keep it as short as like an hour. And this is just another way that law practices tend to get urgency coded. It's that same reward cycle we talked about back in episode 106, but playing out in a client facing context. We need to drop everything, react immediately, signal that you care, the squeaky wheel gets the grease, except now the squeaky wheel is any client who picks up the phone or sends you an email.

But think about this for a minute. If every client gets a message that you'll drop whatever you're doing for them, then when exactly are you and your team going to do any actual work? And honestly, from the client's perspective, would they really want you dropping their matter to immediately respond to somebody else's inquiry?

And look, I'm not saying that responsiveness doesn't matter. I think it is very important, but a lot of responsiveness is actually a form of failure demand. And the only reason clients are calling you now is that they have no idea what the heck is actually happening on their matter and they correctly feel entitled to know. But even if that's the nature of their inquiry, what clients actually need is a little different from what conventional wisdom assumes.

I think most important is that clients want to know that their inquiry was received. They need to know it's not going to fall into a black hole, but they generally don't need a substantive answer right this minute. They understand you're a busy professional. Most reasonable people will get that.

What they really want is consistency and predictability, two words that should sound familiar if you've been following the series. They want to know when you'll respond and that when you do respond, you'll have something useful to say. Mostly they want to know that their matter is progressing, or even if it's not, because it's stuck for a good reason.

I actually saw this play out recently with a client of mine. In this case, a legal team within a regulatory agency. And an investigator there made an observation that captures this dynamic really well. She said, if people know what to expect, they're far less likely to bug us asking for status updates. It's essentially the difference between managed waiting and unexpected waiting. And it's unexpected waiting that's the problem.

And then with the work we did together, once the intake team started setting clear expectations up front and sending proactive status updates at regular points in the process, then the volume of anxiety-driven inquiries dropped significantly. That freed up time that the investigators could redirect towards actually making progress on these cases instead of constantly fielding the what's going on with my case calls.

I think the mistake that a lot of firms make is that they conflate that third social-emotional need, consortium, with this idea that responsiveness and speed is the answer to it. And I don't think that consortium comes from the immediate response. It comes from the client feeling like you have a plan and that they're part of that plan.

So for me, a well-designed client journey map communicates that sense of consortium far more effectively than a quick email reply ever could. Because it says we've thought about your entire experience. We have a system to take care of you and here's how it's going to work.

So what do I mean by a client journey map? At its core, client journey mapping is a process. It's the practice of describing the entire arc of the client's experience with your firm from the moment they first reach out for help with their legal problem all the way through to the final resolution and sometimes beyond.

And I want to be clear, this is not a marketing exercise, right? There is a place for that in terms of building personas, but this isn't about branding or sales funnels or lead conversion. This is about operational architecture. You're designing your delivery system, that delivering the work pipeline, around the client's experience instead of just building it around your internal experience or convenience.

And I like to start the process by asking a set of questions that you've probably considered before, but you may not have reduced them to an active part of your process or documentation. And that includes things like, how or why does a person encounter the type of legal problem that you solve? What's happening in their life when they finally decide to seek professional help? What finally pushed them over that I need to hire a lawyer threshold we talked about earlier?

And it's not just tactical, it's also getting to what is their emotional state when they first come to you? Are they scared, confused, grieving, angry, resigned? What does a better future look like from their perspective? And not just from a legal technicality standpoint, but from a how do I want my life to be different standpoint.

And then it's thinking about where in your process are they likely to feel confused or anxious, maybe disengaged or overwhelmed? And what are the points where they need to actively participate, not so much as the customer, but as a member of your project delivery team where they provide the raw materials and make decisions or show up for something that allow you to move their matter forward?

As you're working through those questions, you will inevitably start defining the phases of the journey from the client's point of view, not just your workflow stages, their experience stages. And this is where something interesting starts to happen because the act of defining the client journey almost always simplifies and clarifies your internal workflow.

I've seen this repeatedly. Teams that map the client journey end up simplifying their Kanban boards, eliminating redundant steps, and finding places where work was either hiding or sometimes getting stuck because the client need either wasn't clear or wasn't getting met, often both.

And you'll wind up with phases that are familiar, probably intake and engagement, information gathering, strategy development, and then whatever the core work phases are for your particular practice area, whether it be transactional or dispute-oriented. The key is for each phase, I want you to think about how to define and communicate four distinct things.

Most importantly is what is the purpose of this phase from the client perspective? Both again, in that short term and in pursuit of their overall goal or objective. And doing that grounds each set of interactions in a clear why statement, or even sometimes from the client's point of view, a what's in it for me statement.

And from there, we can get to the more practical navigation elements. What is the expected timing of this phase? What does the client need to do? And then what will we the legal team do? If you recall from episode 104, the items on this list often bear a close resemblance to those definitions of ready and definitions of done we need for our overall workflow to function smoothly.

But that what you need to do and what we will do structure is critical because it also makes the partnership explicit. It conveys to your client that point I made earlier. They aren't a passive consumer of your legal service, they're a resource on the project team. You're both working toward the same goal and that goal is the client's interest.

And when you string those parts together, the big pieces of progress you'll make at each phase of the journey, and then the specific tasks that need to happen both from the client's standpoint and what you're going to do at each phase, then you wind up with sort of the legal equivalent of the Domino's Pizza Tracker for both you and the client to reference.

And a quick aside, I know there's a legal intake company using that pizza tracker analogy. It's weird to me that they stop at intake. I'm talking about the full client journey.

But once you've got the overall process fleshed out and then you've answered those four questions, the why, the what's the timing, and then what will the client do, what will we do for each phase along the way, and then when you communicate that with the client, you also include a you are here marker to help the client understand both where they've been, where they sit, and where they're going, you wind up with a tool that is really effective for that navigating complexity prong of why clients have even reached out to you in the first place.

And I'll say there's an opportunity to get creative here. Most of the maps I tend to work on just use numbered steps, but I've seen some pretty interesting versions including representing stages of work as a mountain to climb with various way posts along the way or as a canoe trip across the boundary waters of Minnesota with various islands to visit.

Now, one other thing that I think is really important in the client journey mapping process, and probably in one of those onboarding and orientation phases, is communicating a goal section that captures all of the possible benefits of your particular legal service. Clients often come in with one or two goals in mind, but by articulating a broader set of goals for the engagement, especially calling out things that they may not have thought of, you're doing three things simultaneously.

Number one, you're demonstrating expertise. Number two, you get the client thinking more expansively about what success looks like. And number three, you create anchors that you can tie back to when the client's resolve starts to waver. These goals effectively become the product charter, right? They're the shared agreement about what you're working towards together with the client.

So here's what makes the client journey mapping exercise so powerful is that it's not just one thing you wind up with. It becomes this sort of multi-tool that simultaneously solves a lot of different problems across different parts of your practice. It's one exercise with at least four distinct payoffs.

First, it aligns your internal team. When you, ideally with your team, collaboratively define what the ideal client journey should look like, then everyone starts to better understand how their daily work connects to the client's progress. So the paralegal preparing documents isn't just checking a box on a task list. They're moving the client to the next phase of their journey. By the same token, the legal assistant scheduling that signing appointment isn't just coordinating calendars, they're helping the client reach a major milestone.

As I said, it really helps for this to be a team exercise. It is not something you should draft in your office and hand down from on high. You want the people who actually do the work to help define the journey because that builds buy-in and shared understanding. It also gives real meaning to all the systems we've been building throughout this series, the whip limits, the cadences, the quality standards.

They all exist to keep this journey moving smoothly, to keep the promises that you make to clients on track. Another way I like to think about it is the journey map helps define the why behind the what in terms of what we're doing along our workflow.

The second thing that this journey map does is engage the client as a true partner. And when you share this journey map with your client, whether it's a letter or a handout, maybe a progress tracker, and then ideally part of your verbal walk through during intake or onboarding, you're not just conveying information, you're actually recruiting the client to the series of steps they need to take to achieve their own goals.

And by frontloading the information that will guide and govern the entire relationship, you're setting the tone and expectations for all of your interactions with each other. Every touchpoint after that becomes a fulfillment of an expectation as opposed to a surprise along the route.

And then when the client inevitably stalls out on their part of the work, their homework, because they will stall out, you're not so much nagging them about paperwork, you're reconnecting them to the commitments they've made and the goals that they have. You can say things like, remember, we said we can't do X until you do Y, and we need to do X in order to get you out of this mess you're in. Getting us the information or the approval that we need is what moves you towards your goal so that you can put all this legal stuff behind you.

The third thing I like about these journey maps is it helps you create realistic expectations for your own workflow. In my experience, the act of seeing things from the client's perspective reveals some interesting truths about your workflow that are hard to see when you're just focused on your internal process.

If you start to think about things like, what does this person have going on in their life when we send them this eight-page questionnaire? You start to understand why client homework comes back late or incomplete. And that then begs questions around experiments you can try to improve your ability to get the information you need. Maybe that eight-page questionnaire is not the best tool.

I'll actually give you a quick example from a recent workshop I did. A family law firm was consistently having issues getting their clients' financial records in the format they needed, actual PDFs and not screenshots. And as we were talking about it, one paralegal realized that most financial institutions will actually provide PDF statements for a reasonable fee and with just a couple days turnaround time.

So instead of hounding their client to go log into their bank accounts and gather PDFs, this firm started giving those clients the option to just sign a power of attorney and pay a $50 fee, then not have that homework assignment at all. We're just going to pay the bank to do it. A lot of clients will happily take that deal.

And the fourth thing is that your client journey map actually does become a business development asset. And I know I said earlier that this isn't a marketing exercise, but that doesn't mean there isn't a marketing use. That clear client journey map communicates we know what we're doing to potential clients and referral sources alike.

Remember, people are buying expertise and they like to see that their expert has a system and a plan for getting the work done. The journey map itself, even just a high-level version of it, becomes a tangible artifact that really helps differentiate you in a profession that's not exactly known for this kind of intentional client-focused design.

Now, there's actually a fifth dimension to all this that you might not have considered and it should actually give you some added incentive to do this exercise. The first five rules of professional conduct, what I sometimes call the front five, essentially describe what a good client journey map helps you operationalize.

Most lawyers think of the RPCs as individual obligations they fulfill through individual effort. I'm competent because I know the law. I'm diligent because I work hard. I communicate because I return calls promptly.

But a client journey map can help you turn those individual obligations into system properties. They're things that are built into your delivery design instead of being dependent on any one person's individual effort. Let me walk you through them quickly.

Rule 1.1 is competence. And the journey map itself demonstrates competence. You've thought through the entire arc of the client's matter. You know what comes next, what the timeline looks like, what's required at each stage, what the potential complications are. A firm that can present a clear, well-thought-out roadmap to a client at intake is showing, not just telling, that they know what they're doing. And of course you have to actually follow that map, but that's a lot easier too when you have a map to begin with.

Rule 1.2, scope and allocation of authority. Remember that what you need to do and what we will do couplet at each phase of the journey? That's literally an allocation of responsibility between lawyer and client. You're defining the scope of each party's role at every stage of the matter, including the decisions the client gets to make and has to make and which ones can be handled at the discretion of the lawyer.

Rule 1.3 is diligence. Those cadence meetings we talked about in episode 106, the progress tracking, the defined timelines for each phase on the client journey map, all of that is diligence made structural. You're not relying on individual effort or memory to keep matters moving forward. You've built a system that ensures consistent, ongoing attention to client work and moving matters forward.

Rule 1.4 is communication, and the journey map is a communication framework. It tells the client what to expect, when to expect it, what's expected of them. Each phase transition becomes a natural communication touchpoint, including an opportunity to check in on assumptions and make sure the goals we originally articulated are still the right ones based on what we've learned. You're not just responding to client inquiries, you're proactively managing the flow of information.

And then rule 1.5 is fees. And I'd argue that when a client understands the phases, the scope, and the timeline of their matter, the fee conversations become dramatically easier. The client understands what they're paying for because they can see the work and they understand the exchange of value I talked about at the beginning of this episode.

Also, if you're moving towards flat fee or my favorite, a phased flat fee pricing model, the journey map becomes a foundation for your pricing structure. It's also a great way for using phased flat fees for handling straightforward phases but then switching over to hourly for particularly complex or uncertain parts of the work.

But regardless, the rules of professional conduct, they've always been pointing towards this kind of systematic client-centered design. It's just most firms don't adopt a framework for operationalizing the rules in this way. I think the journey map doesn't just help you comply with the RPCs, it helps you exceed them in a way that actually makes your practice work better, not just compliant with regulations.

Okay, so let me tie this all back to all the things I've been building throughout this 101 series because every concept we've covered up to now has a client-facing counterpart, and the journey map is what makes those connections visible.

I already mentioned those definitions of ready from episode 104. The client's homework at each phase of the journey, those are the readiness criteria made client visible. Instead of internal checkboxes, you have express agreements with the client to get you the raw materials you need to do your work at each phase of the workflow.

Similar things are true for definitions of done, except now it's you that has the deliverables and the client is at least one of the customers for your output. It's where I like to have those actual deliverables and not just conversations because they serve as a tangible milestone to mark progress along the client journey. And that's also part of the quid pro quo and the phase level exchange of value that I talked about at the top of the episode.

The other key concept from episode 104 that this map helps with is preventing failure demand. When the client knows exactly what to expect and what's expected of them, then you're less likely to have random questions and status check requests coming out of left field.

Then moving on to episode 105 and the WIP limits, those are what allow you to actually deliver the consistent predictable experience that your journey map promises. Because without capacity discipline, the journey map is just a nice brochure. But with the WIP limits in place, you can actually keep the promises the map makes about timing and attention and delivering those deliverables on time.

The cadence meetings from episode 106 wind up transforming from internal focused progress checks to a concern for the customer journey. It's not just about whether your team is delivering the work, it's about meeting client expectations and the firm's commitments as you've documented in your journey map.

And then finally, the throughput and cycle time metrics I mentioned last week in 107, they both feed the promises you make and the expectations you set along the map, and then they tell you whether that journey is actually moving at the pace you describe to the clients.

If you promised a six-week estate planning process but your cycle time data shows that you're averaging 10 weeks, that's information you need to adjust the expectations you're setting or it tells you you need to figure out how to increase your delivery capacity.

A good client journey map becomes the connective tissue between your internal operating system and the client experience. It's how you make sure that the promise-keeping machine we've been talking about is making the right promises and keeping them. And not just about the practical, technical deliverables, but a machine that takes into account how each of those deliverables advance the client's goals and meet their emotional needs as well.

Another way to say it, everything I've encouraged you to work towards in this series so far serves this bigger purpose, creating a practice that can reliably deliver what clients actually need and not just what lawyers think they should be providing.

Alright, looking forward. Today we mapped the journey. We asked what should the client's experience look like? But a map isn't the same as the actual road.

So next week, we're going to take this journey map and turn it into operating standards, things like service level expectations, consistency mechanisms, and the practices that ensure every client actually gets the experience that you've designed and that your designs are evolving to meet the needs of the client experience. So, we've drawn the map. Next week, we'll hit the road.

So, this is the part of the podcast where normally I'd tell you about some specific GreenLine features that support the things I've discussed today.

In this case, we don't have a specific client journey mapping feature per se, but all of the workflow tools I've been discussing throughout this series, the quality control templates, the board design tools, the capacity monitoring, the metrics dashboard, they're all designed to work together as part of that promise keeping machine we've been building.

What I do have is a client journey mapping template that I can share with you along with some ideas for using AI tools to help you apply the template and build out your own journey maps. And my co-founder, Jeff De Francisco and I have also created some example documents from his estate planning and trust administration practice that show what these journey maps can look like in the real world.

So if you're interested in the template and those examples, drop me a line at john.grant@greenline.legal and put “Client Journey Map” in the subject line. If we get enough interest, we'll set up a webinar or some other session to walk through the process in more detail.

And if you want to see how GreenLine helps operationalize the overall workflow we've been building throughout this series, head on over to greenline.legal and click that book a demo button. I'd love to show you what we're building and how it can work for your law practice.

All right, that's it for today. If you found this episode useful, please help spread the word by sharing it with a colleague or a friend. And it's been a while since I asked for this, but if you could go into Apple Podcasts, Spotify, or YouTube and leave me a review, I'd really appreciate it. It helps goose the algorithm into recommending this show for more people who could benefit from it.

As always, this podcast gets production support from the fantastic team at Digital Freedom Productions, and our theme music is “Hello” by Lunareh. Thanks for listening, and I will catch you again next week.