

SHOWING THE WAY ON CLIENT MAPPING

Costa Rica's Batalla Salto Luna

Even among many tech-savvy law firms, the area of client mapping still lags in development and utilization compared to other legal tech innovations. And that's despite the importance of such mapping – essentially, identifying and measuring each client contact with a law firm and learning how the firm can improve its relationship with the client at each step.

Batalla Salto Luna hopes to change that. The Costa Rican corporate law firm, created a year ago in a merger of two firms, is taking advantage of its status as a relative youngster in the region's legal market by focusing on internal technological innovation and most importantly, getting a foothold in client mapping.

Forum spoke with Mariano Batalla, lead partner of the firm in the initiative, about how Batalla Salto Luna is using client mapping, what benefits it hopes to see and how the process can improve client relations for the firm and its 48 attorneys.

FORUM: *How is your firm looking at legal innovation and trying to best use it?*

MARIANO BATALLA: I think it's unfortunate that we do not have enough legal innovation in the Latin American legal industry right now. We have yet to significantly feel push factors that you can see in other industries or other regions where your clients are being increasingly vocal about their dissatisfaction with the service their law firms are providing and are pushing their service providers to think in innovative ways.

For better or worse, it isn't happening much in this region. So, I think we have been fortunate to take advantage of that and be sort of first to market with some innovations and a few different ways that we approach the market. And frankly, we've had mixed reactions to it.

When we speak with clients about how to budget our projects better and maybe leaving the hourly rate for a more efficient and effective way of pricing that could save them money – looking at outcomes instead of just outputs – sometimes, well ... they look at us as if we were aliens.

FORUM: *How do you get around that with clients?*

BATALLA: We stress to them that our purpose is essentially to improve the lives of our clients and push their success forward. What we mean by that is we take an empathic approach to the way that we deliver our services. We'd like to feel as though we're partners in the business of our clients – to add a more human touch, so to speak.

And the number one way we try to do that, as far as legal innovation goes, is through giving clients a way to understand how we can provide them with different, hopefully better, legal services. I think that takes a little bit of the anxiety out of the equation, too. My goal is to be transparent in everything from how we bill our clients to having open conversations with them about whether they're satisfied with our service and how might we improve.

FORUM: *How does client mapping figure into this strategy?*

BATALLA: In the retail world consumers constantly rate their goods or services – whether a hotel stay, a recent purchase of a shirt or of a restaurant meal. Consumers in other industries are given plenty of opportunities to communicate directly with the companies they buy products from and in turn these companies are constantly tweaking with the customer experience based on feedback and innovation. So why couldn't there be a better way to serve clients in the legal industry in Latin America? We thought it would be interesting for us to map out a client's

journey with our firm from initial contact right to the point where they stop using our services or disengage from the firm because the transaction or the case was resolved.

Our main goal with this is to design a more consistent client experience across however many touch points there are in the delivery of our services, and in that regard we looked for opportunities to introduce more efficient touch points across the spectrum or at least to identify where some weaker touch points were.

With the help of a group of MBA students on a consulting internship, we began a pilot program to carefully consider these touch points using the client journey canvas and the insights and ideas of service design thinking. We went through a number of interviews with team members and with clients to begin mapping out life cycles and then synchronize some of these touch points around clients' own needs and interests.

FORUM: *How does this client journey canvas work?*

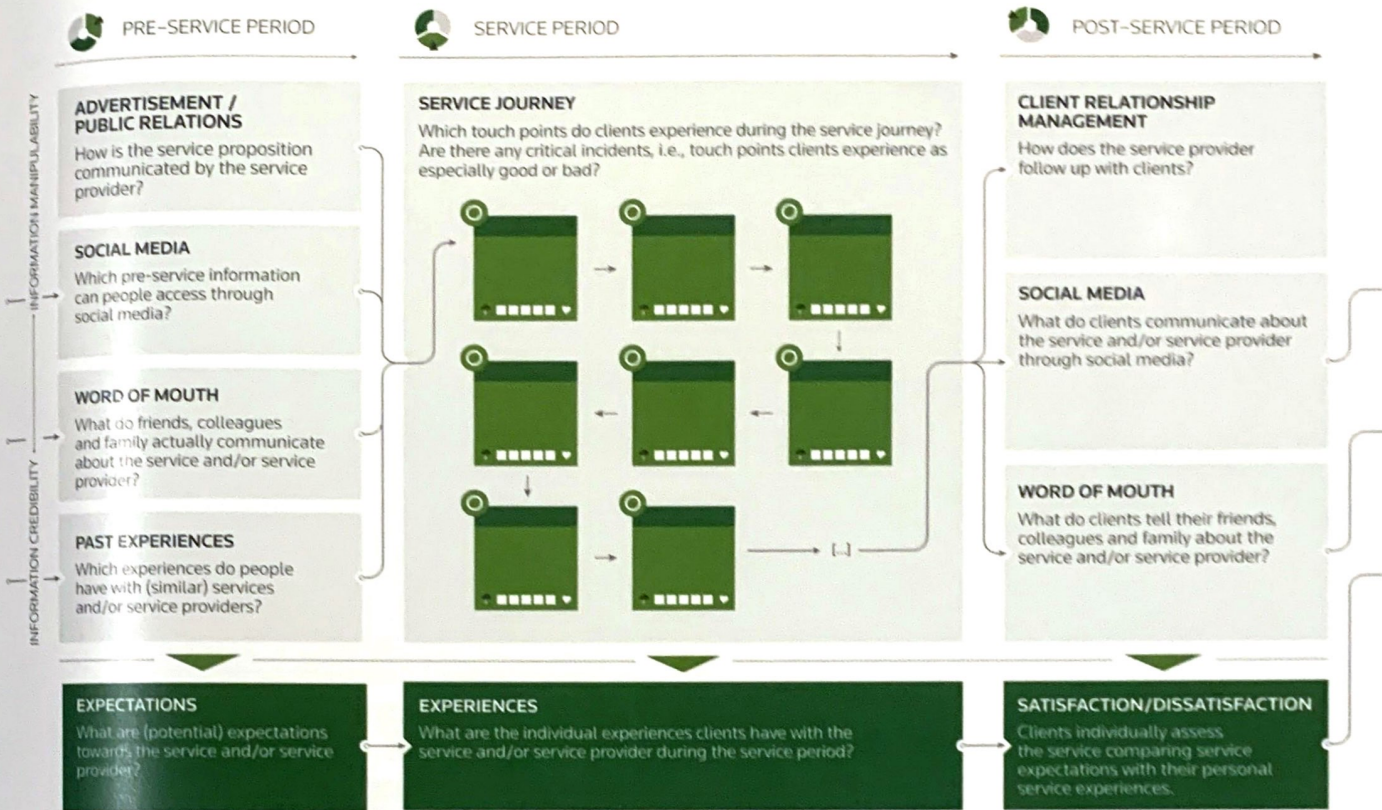
BATALLA: It looks like a flowchart out of an industrial engineering textbook, where you have the "backstage" of our internal activity and the "front stage" of interaction with clients, with different specific actions built into these stages. Within the client journey mapping initiatives there is also an engagement manager that is a bit like a concierge who is with the client throughout the entire process. They're in charge of ensuring that the journey is completed or if there's some troubleshooting to be done, they are there to tackle it.

With the MBA students, we took a long, hard look at where the touch points were, what our backstage and front stage looked like, and where the action is in each type of service. Then we asked ourselves, "How might we innovate? How might we do more with less? How could we think about our service in a more cost-effective way?"

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We tested and compared these client journey maps against the way we currently serve clients to see whether the journey mapping and the innovations embedded in the new processes would actually show clients that they were getting more value from our services.

The client journey canvas



Concept and design: Marc Stülken & Jakob Schneider – inspired by the Business Model Canvas – www.thisisserviceanddesignthinking.com
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That's the point we were after – and it was quite successful, although there is a lot left to be done. We had many clients that were very excited to experience this, and you could see by the look on their faces and in the faces of our team members that they were visualizing more efficient ways of receiving and delivering our legal services.

FORUM: So where does Batalla Salto Luna go from here on client mapping?

BATALLA: Again, this was a pilot project and first, we want to get to the point where we are validating the results we're getting. We got great reviews from clients and a lot of excitement internally from our team members, but this is still a work in progress.

I think client journey mapping initiatives have the potential to become a way to enhance our value proposition and grow our client base all while being efficient and mindful of the financial investments any firm needs to make. Really, I just aim to do more with less.

This in turn would result in looking at how we could leverage technology and the processes we have created to help our people thrive and be more efficient, focused

and happier professionals. Ideally, if and when all of this goes through, we'll have internal teams trained to understand what different courses of action need to be taken in specific situations.

Overall, it's a way of improving the way firms can deliver their service by visualizing the different processes within a firm. It's also a way to become more institutionalized, standardized and more coherent and consistent in dealing with clients. ●



Mariano Batalla is the lead partner of Batalla Salto Luna and represents multinational companies in corporate and compliance matters, and M&A transactions. He oversees legal aspects of due diligence, financing and development of large-scale real estate projects. Drawing on his business expertise and training, Batalla combines design thinking and strategy consulting methodologies to cross-border transactions and corporate affairs.