



# This is the end

## Concluding client representation at the end of a case; make it worthwhile for you and your client



Cooper

BY MILES B. COOPER

The lawyer was looking forward to the next item on the day's calendar, a client-exit interview. These calls were set after the formalities of the case were concluded. "Pat," the lawyer started out, "Thanks for making some time today. As I understand things, everything is done in your case. We've negotiated and paid the medical insurance liens, your funds were wired to you, and we're done. Anything you're aware of that

you believe still needs to be taken care of?" The client was unaware of anything. "Great."

### Answer questions

"Before we formally end the case," the lawyer said, "we wanted to have an opportunity to answer any questions you have." The client had a few. Nothing out of the ordinary. "Now, we covered this when we were evaluating settlement offers, but I want to remind you that the money you receive from a personal injury case is not taxable. If you or your CPA have any questions about this at tax time, reach out." The client appreciated the reminder.

"I want to tell you what happens to your file. As a digital firm, we don't use paper. The digital file is maintained for a minimum of five years. If you have any questions, need access to material – in particular any medical records – let us know." The client asked for a digital copy of the medical records. The lawyer made a note.

### End the representation, not the relationship

"Formally, our work is done. I also want you to understand that we remain a resource going forward. Should you, a family member, or friend, have a legal question about anything, reach out. Many people don't have access to a lawyer who will field initial questions for free. While we are a personal-injury firm, we are good at issue spotting. We can't solve every problem, but we are a good first stop. If it needs a specialist, we usually know a trustworthy lawyer who can help." The client appreciated the offer. "You'll be getting an email within the next week. It is a formal 'end-of-the-case' email. I want you to understand that email is a formality we follow at the firm but don't want you to be dissuaded from reaching out to us in the future."

### Get feedback

The lawyer's tone changed slightly. "We have a few questions for you now. We want your feedback. We strive to make this experience as simple as possible. And we expect there are areas

where we can improve. We want brutal honesty here – are there areas where we fell short, even the slightest bit?" The client was complimentary. The lawyer probed further but did not get any recommendations. "What about positives? A firm member's actions that were above and beyond? Anything we did that we should make sure to continue?" The client had a few comments. The lawyer made some notes – useful for the next team meeting.

### Get reviews

"Thank you. We appreciate it. I mentioned we'd be sending an end-of-case email. With your permission, I'd like to send a second email. These days, lots of people look at reviews when picking a firm. I was typing when you gave me your feedback. I'd like to send those notes to you with links to a few sites, like Google Reviews and Yelp, for our firm." The client was happy to do so and was also willing to be a reference should a potential client want one. "Knowing that you are back to riding your bike, is there any of our swag we can send you? Some water bottles, a cap?" They discussed options, and the client asked for a couple items. The package would include a few business cards as well.

### Get referrals

"Well, that's all I was hoping to cover," the lawyer said, "Was there anything on your list that we did not already cover?" The client didn't have anything. "It probably goes without saying, but the highest praise we can get is for you to pass our name on to someone in need. If you do that, please let us know you've done so, and tell the person to mention your name." The lawyer wrapped up. "It was a pleasure to get to know you. I hope you or your friends never need to reach out, but know we're here if needed."

### Outro

The lawyer hung up the phone, feeling good about the conversation. The client's questions were answered, the client was pleased with the work the firm had done, and the lawyer made sure that the client understood future referrals were important to the firm. The lawyer sent a short email to make sure the few to-do items were followed up on and moved on to the day's next project.

*Miles B. Cooper is a partner at Emison Cooper & Cooper LLP. He represents people with personal injury and wrongful death cases. In addition to litigating his own cases, he associates in as trial counsel and consults on trial matters. He has served as lead counsel, co-counsel, second seat, and schlepper over his career, and is a member of the American Board of Trial Advocates. Cooper's interests beyond litigation include trial presentation technologies and bicycling (although not at the same time).*