The LawMarketing Portal

GETTING CLIENT INPUT: WHAT'S THE POINT?

By Sally J. Schmidt. Sally has conducted written surveys, telephone surveys, personal interviews and focus groups for scores of law firms, and regularly counsels marketing directors and partners about survey methodology and process. She is President of Schmidt Marketing, Inc., Burnsville, Minnesota, http://www.schmidt-marketing.com, Telephone: (612) 895-9915, Fax: (612) 895-1153, Email: schmidtmarketing@msn.com. This article is based on her presentation at the September meeting of the Minnesota Chapter of the Legal Marketing Association.


Sally J. Schmidt

It is clear that programs to capture the "voice of the client" are becoming, if not routine, at least acceptable for law firms. Still, many struggle with the "how" of the process.

Some firms send the managing partner to speak to the firm's top clients. Some firms send written questionnaires after a client matter is closed. Still other firms gather clients into focus groups, panels or advisory boards. There are nearly as many variations on the theme as there are substantive practices.

What is the best way to capture client feedback? The answer is found in a follow-up question: What are your objectives? The purpose of your client survey program will determine:

- What methodology you use
- Who conducts the survey
- Who gets surveyed
- The content of the questions you ask
- How you receive or use the feedback
- How often the program is conducted.

Several examples are illustrated below.

Client Feedback Scenarios

Example 1: The estate planning lawyers want to implement a survey program as a method of quality control. They want a process to contact clients to find out how the lawyer and staff did in meeting clients' expectations.

Recommendation: In this case, quality can be measured. Because individual clients may be intimidated by lawyers and because of the volume of this practice, it makes the most sense to consider a **written survey** that is sent out after the plan document is signed and the bill is paid, asking clients to rate the firm's performance on the quality factors.

Example 2: The management committee wants to implement a process to ensure the satisfaction of the firm's top clients, who produce a disproportionate percentage of the firm's fees. The firm is also concerned that client relationships are not being institutionalized.

Recommendation: To get candid feedback and to expand the client's relationship with the firm, the managing partner (or members of the management committee) can set up **face-to-face** meetings with these key clients, to discuss their relationships with the firm, ask how the firm can improve, and provide another point of contact.

Example 3: The financial services group has one major bank client. There is a primary decision-maker (i.e., the general counsel), but a lot of other people (i.e., loan officers) who deal with the firm on a regular basis. The group wants to be sure the client is satisfied.

Recommendation: The two (or more) different audiences need to be treated differently. The general counsel is the "big picture" person and the one who directs the work. It would be inappropriate to: (1) Send a written questionnaire (he/she warrants a personal visit); or, (2) Ask about issues with which he/she is probably not familiar (e.g., how the loan officers perceive the turnaround time). This scenario would suggest a **personal interview** with the GC (or even a phone call simply to discuss the firm's interest in polling the other bank representatives), followed by another process for the people dealing with the day-to-day issues. Depending on the number of people involved, or their locations, the loan officers may **be interviewed in person, sent a written questionnaire or asked to participate in a telephone interview.**

Example 4: The firm has lost several clients over the last few years, primarily in the real estate practice area. While everyone thinks they know why (i.e., lack of responsiveness), management wants some indisputable proof in order to redirect the efforts of the department.

Recommendation: This clearly calls for a **third party intermediary**, who can offer the client the opportunity to be candid about his or her displeasure. In addition, the "messenger" can wear the black hat and deliver the news that the firm finds difficult to address.

Tips for Successful Survey Programs

As you begin to implement your client feedback program, here are some additional suggestions to make the process effective:

- Don't try to do too much. Many firms make the mistake of including too many questions or discussion areas because they've never asked clients for feedback before. Specific issues (e.g., whether clients would be interested in pricing alternatives) should be dealt with in focused research programs.
- Vary the form of questions. If you have a written questionnaire, make it more interesting to the recipient by mixing open-ended questions and various forms of closed-ended questions (e.g., multiple choice, ranking, rating, etc.).
- Ask sensitive questions (e.g., "What is your legal budget?") late in the survey. People will be much inclined to answer after they have already invested in the process, whether it's a written questionnaire or an interview.
- Don't ask questions that clients can't answer (e.g., how other divisions make decisions) or that are irrelevant to them.
- Group associated categories of questions together:
    - Invoicing, fees and value
    - Status reporting and communications
    - Quality of work and results; etc.).

- Don't infer anything about people who don't return written surveys. Most firms have a response rate between 20-50%, but there isn't any way of knowing if the other 50-80% is happy or unhappy with the firm—unless, of course, you follow up and ask them, which is a very good idea.
- Don't ask about things that are important to you—find out what's important to clients. Many client surveys come back with excellent grades for things like "creativity" or "integrity" (about which lawyers are concerned) while clients wish you'd asked about keeping them in the loop or staying on schedule.

Resource Directory | Legal Marketing Technology | Sponsorship Opportunities | FAQ
Upcoming Marketing Events | Friends of LawMarketing | Job Openings | The Bookstore
About LawMarketing | Join Now! | Need to Know News | Best of LawMarketing | Member Login