

Marketing

Following Up on Client Feedback: The Key to the Survey Process

SALLY J. SCHMIDT | One good thing that has come from the generally dismal economy is that lawyers are more apt to contact clients to find out how things are going. Many law firms, in fact, have used the economic malaise as an opportunity to survey their clients to learn about their perceptions of the firm. But most firms fail to bring the process home.

Resources abound touting the importance of “voice of the client” programs and discussing how to conduct surveys to gauge clients’ need for and level of satisfaction with the firm. And most of those resources include the same caveat: The most important part of the survey process—whether it’s done in person, by phone or in written form—is following up on the feedback received.

Yet that’s usually where the ball gets dropped. Firms will conduct a survey, record the results and then think the project is done. Enhancing client relationships, however, is not a project—it’s a process. Here are thoughts on how to follow up on a client survey to truly get the benefits.



Sally J. Schmidt (sallyschmidt@schmidt-marketing.com), President of Schmidt Marketing, Inc., has counseled more than 400 law firm clients over the past 20 years. She was the first president of the Legal Marketing Association.



Scenario One: A Client Gives Very Positive Feedback

Let’s say the client gives the firm great marks—rating overall satisfaction as a 5 on a 5-point scale, and rating each specific quality, like responsiveness or billing practices, a 4 or a 5. What should you do to follow up on feedback like this?

First, you should send a personal note or make a phone call to thank the client for participating. Clients are busy, too, remember. In fact, in this age of shrinking headcounts and budget cuts, a client that takes the

time to participate in a survey is really doing you a favor, so you want to convey how much you appreciate it.

Second, every survey contains nuggets that can lead to follow-up conversations with clients. If a client gives you a 4 out of 5 on a specific factor, for example, that could prompt this follow-up question: “Joe, I’m delighted that you’re so satisfied, but we don’t want to stop trying to improve. In your opinion, what can we do to bring up our grade for ‘Status reporting’ from a 4 to a 5?”

Similarly, you may see that a client ranks various factors in terms of importance, putting “Understanding of my business” first on the list. This could lead to a follow-up discussion that begins with: “Karen, I saw on the interview summary that our understanding your business is really important to you. What else can we do to learn more about your business?” Even positive survey results can present opportunities for deepening the relationship.

Scenario Two: A Client Doesn’t Return a Survey

Lawyers often jump to conclusions when a client doesn’t participate in the survey process. They think that either the client is happy and doesn’t want to be bothered to say so, or the client is unhappy and isn’t engaged enough with them to say so. But the truth is that it is impossible to conjecture with any