

Play to Win

[**Get Feedback from Your Clients**](http://www.attorneyatwork.com/get-feedback-clients/)

By [Sally J. Schmidt](http://www.attorneyatwork.com/author/sally-j-schmidt/) | Feb.20.14 | [Business Development](http://www.attorneyatwork.com/category/business-development/), [Client Relations](http://www.attorneyatwork.com/category/client-relations/), [Daily Dispatch](http://www.attorneyatwork.com/category/articles/), [Law Firm Management](http://www.attorneyatwork.com/category/management/)



In the legal industry, there is much discussion but scant implementation on the issue of client feedback. Research shows that few firms make the attempt to gather client feedback in any meaningful or systematic way.

Should law firms be interviewing or surveying clients? Indisputably. But, regardless of what the “firm” is doing, every lawyer should be having feedback conversations as well. Whether the target is a good client or a regular referral source, asking for input signals that you are interested in learning what people think, knowing what’s going on in their businesses and finding out what needs to be changed, all of which are important to long-term relationships.

There are many different types of client relationships and, as a result, many different ways to structure feedback discussions.

**The “Regular Meeting”**

If you have an ongoing relationship with a client or referral source, consider a regularly scheduled feedback meeting. The frequency and nature of these meetings should be appropriate to the volume of matters and the type of relationship. For example:

* For a closely held business client, you might schedule a breakfast meeting once a month near the client’s office.
* For an existing institutional client, like a bank, an on-site quarterly or annual review with the legal department might make sense.
* For a fast-moving, out-of-town private equity or real-estate client, a weekly pipeline meeting by telephone might be helpful.

It’s easy to ask for this forum: “Since we are fortunate to receive an ongoing flow of matters from you, we want to make sure we are taking care of your business as well as we can. I would love to structure a regular time to get your feedback on how things are going, what we can do better and what is coming down the pike. I was thinking a quarterly face-to-face meeting would be useful; what do you think?”

When you get a new client, think about establishing a regular feedback protocol at the onset.

**The “One-off Matter”**

Some clients will not produce repeat business. It is still very helpful to get their feedback to incorporate into possible future engagements.

After their matter is concluded (and any billing issues are resolved), you can simply say, “We very much appreciated the opportunity to work with you on the XYZ matter. Even though we may not have additional assignments in the foreseeable future, we would like to get your candid thoughts on our performance and what could have been done better. I would like to schedule a one-hour [face-to-face meeting in your office or telephone call] over the next few weeks while the matter is still fresh. Can you let me know what dates and times might be convenient for you?”

**What to Ask**

Once you set up the meeting, the agenda depends on the client and the situation. Here are some areas you can explore:

* **Past performance:** ”**How have we done?”** Questions could be posed about staffing, communications (e.g., status reporting), service (e.g., responsiveness), the firm’s value (e.g., cost and outcome) and whether they would recommend your firm to others.
* **Current projects:** **“Where do we stand?”** You could engage in a conversation about matter status, importance factors, relationships with members of the team, projected timetables and communications.
* **Future plans:** ”**What’s down the road?”** It would be useful to talk about projected projects, anticipated needs, changes to the company, trends in the industry, competitive inroads and potential changes to the relationship with the firm.

In all cases, the goal is to identify areas for improvement and potential future opportunities.

Studies have shown that clients who are engaged are more loyal and more likely to refer other business to the firm. While there are many ways to seek client feedback, and some methods may be better than others, the key is just to do it.

You will see the difference in your relationships, your performance and your future flow of business.

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