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 certainty. So, if a client doesn't respond, think of it as a perfect time for the lawyer in charge of the client's work to make a *personal* effort to get feedback and, ideally, engage the client more.

Accordingly, you should consider reaching out like this: "Lily, I see you didn't return a client satisfaction survey. I know you're busy but I would love to get your feedback to make sure we're doing the right things for you. Would you have a little time to go through the questions with me by phone or in a meeting?"

The client's reaction to this request should provide insights into the decision to pass on the survey and where the client really stands in her relationship with you.

Scenario Three: A Client Gives Negative Feedback or Notes Areas for Improvement

Clients frequently have thoughts on how their relationship with the firm can be improved. Even very satisfied clients can often pinpoint services or protocols that would make their lives easier. In interviews or surveys, typical comments involve things like this:

- Not knowing enough people at the firm
- Lacking an identified "lieutenant" for their matters
- Not getting enough communication about where things stand on cases
- The lawyers' lack of knowledge about the client's business or industry
- The cost of the services

Keep in mind that, while it may be difficult to hear criticisms, it can be just as difficult—if not more so—for clients to be candid. Clients are, after all, concerned about maintaining their relationships, too. So when a client does outline areas for improvement, it is crucial to treat the problem like an opportunity. Clients want to know this from you:

- That you heard them
- That you'll fix the problem
- And that you'll sustain the improvement

So how should you follow up then? First, don't just respond—respond *quickly*. Studies have shown that clients are much more likely to stay with you long-term if you react to problems immediately.

Second, have a more granular conversation with the client about what needs improvement. If the complaint relates to cost, for example, what exactly is the trigger? Too much time being billed? The hourly rates charged? The way the matters are being staffed? The expenses? The time spent on specific activities? In order to address the problem, you need to identify the underlying issues.

Next, work with your clients to develop the appropriate solution. What are their thoughts on how to address the issue? Do they want more legal assistants working on their files? Is there work that could be shifted to another internal resource? Can you provide a better estimate up front to eliminate surprises?

After working up a solution with the client, it's important that the solution gets implemented consistently and continually. That means the lawyer with the primary relationship should share the problem and solution internally, so everyone who works with the client understands there is a hot button issue and how the firm is addressing it. Even more important, the responsible lawyer should put together a follow-up process or establish a regular time frame for checking on the progress in fixing the problem. Recidivism is rampant in law firms. Many clients have noted that, although a firm may work hard to improve following discussions like these, over time their lawyers slip back into their bad habits.

Scenario Four: A Client Identifies a Problem That Can't Be Fixed

Let's say the client is a health-care organization and the primary contact in the organization doesn't like your firm's regulatory attorney. Unfortunately, that attorney is the only person in the firm with that expertise and you need him on the service team for this client.

In this case, you need to be honest with everyone involved and determine what can be done to make the best of the situation. For example, you might suggest to the client that all communication go through you, keeping the client at a distance from the regulatory attorney.

While this would require a difficult internal conversation, what's worse—talking to a colleague or losing a client?

Keeping the Process Going

Client surveys and interviews are among the most important things a law firm can do to gain valuable feedback on areas for improvement and to solidify relationships with clients. Yet for the process to be truly beneficial, it takes an open mind and active follow up.

In addition to following up on the specific survey or interview results, firms should repeat their surveys to evaluate changes in what's important to clients or changes in their evaluations of the firm's performance. The more lawyers can solicit this kind of information on an ongoing basis, the better, more loyal and long term their client relationships will be. LP