# Opinion Surveys Can Help Firms Keep Clients Happy

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For a law firm to survive, it must serve its clients well. Yet most firms do not have an organized method to evaluate their clients' perceptions of the firm's performance. Without client feedback, the firm's management cannot determine the strength of the relationship.

The client opinion survey is one of the best ways to measure client satisfaction. A well-designed and properly conducted survey also can provide information that will help the firm make decisions on marketing, growth, fee determination and practice emphasis.

Questions to be considered by a firm planning to conduct a client opinion survey include:

- **What is the survey's purpose?**
  The purpose will dictate the type of information to be collected. Most firms will find themselves in an endless debate trying to determine what each lawyer wants to see on the survey. A way to avoid that trap is to designate a small group of lawyers and the appropriate support staff to define the purpose and select the survey questions.
- **Who should be surveyed?**
  Business and institutional clients are accustomed to participating in customer-satisfaction surveys and probably would participate in written or face-to-face programs on an annual basis. The most important clients of the firm should be interviewed face-to-face in the client's office. Certain types of consumer practices, personal injury, bankruptcy, and family law need to get feedback from clients immediately. These clients should be surveyed using comment cards after every office visit.
- **Who should conduct the survey?**
  This is another topic that can cause endless debate. The firm should delegate the management of the program to no more than three or four lawyers and the firm's marketing director. Although many lawyers believe that the best people to conduct the survey are public relations agencies and consultants, an effective survey is one that gets to the bottom of the issues, and outsiders don't always know the proper follow-up questions to ask. Surveys also can be opportunities to market the firm's capabilities, and outsiders obviously cannot perform that function. The most critical qualifications for the people conducting the survey are the abilities to communicate and to show empathy, trust and concern for the client's well-being. The interviewers also should have some knowledge of the client's business and key decision makers and should have received training in listening skills and questioning

techniques.

Most of the initial interviews will be face-to-face, and training in body language or semiotics (non-verbal communications) will be important. The training should include a pretest of the questionnaire, with the interviewers being videotaped conducting interviews with mock clients.

- **When should the survey be conducted?**

  Now. Client satisfaction is the best measure of a firm's stability and future. Firms that don't have a way to measure client satisfaction will eventually see the results of poor client relationships in less-palatable ways than merely unpleasant answers to a survey.

The most obvious is when the client fires the firm. Often a client feels hurt because of the firm's perceived indifference and shifts its business away from the firm quietly and without the firm's knowledge. This scenario often is accompanied by a panic attack by the firm or a "diplomatic mission" to determine why the firm no longer is getting its share of the client's legal business. If the firm has to ask for its "fair share," it probably is too late to save the relationship.

Although many firms are reluctant even to broach the subject of client surveys for fear of offending their partners, this reluctance needs to be overcome. Some partners may feel they are being pressured or scrutinized unfairly. The firm needs to help them realize that this is not the purpose of the survey. The firm also needs to recognize and accept that it may hear bad news from its clients. Clients are not reluctant to give their opinions, and firms that ask the tough questions generally are viewed as caring and attentive. The best way to determine client satisfaction is to ask the client.

## Interview Blueprint

The interviewing techniques will be critical to the success of the relationship between the firm and the client and the quality of the information the firm receives. The questions should be open and allow for detailed feedback. The questioning style should avoid interrogating the client.

If the client should become offended or confrontational, the interviewer should employ reflective listening techniques to understand the true nature of the client's dissatisfaction.

The following are areas that should be discussed and tailored for each client interview:

- An evaluation of the firm's performance on all matters.

- Performance evaluation of the specific practice areas used by the client.
- Performance evaluation of the partner responsible for the client.
- Performance evaluation of the other lawyers who have worked on the client's matters.
- Performance evaluation of the quality of service provided in document preparation, informational systems support, paraprofessional support, telephone and voice mail, electronic mail and facsimile communications, and administrative support.
    1. Quality of advice and counsel.
    2. Quality of the work product.
    3. Firm's recognition and fulfillment of client's needs.
    4. Clarity of the billing procedures and fee arrangements.
    5. Accessibility of the firm's partners and other key personnel.
    6. Whether the firm has kept the client informed.
    7. The firm's strengths and weaknesses.
    8. The firm's reputation within the community or industry.
    9. Areas for improvement.
    10. Competitive analysis - the firm compared to other firms or alternatives.
    11. Willingness to refer others to the firm.
    12. Value the client has received for its investment in the firm.
    13. The client's view of the firm's approach to matters on which it has worked.
    14. Responsiveness of the individual lawyers and the firm to the client.
    15. How the firm has shown that it cares about the client.

## Implementing A Survey

The basic steps from the time the firm decides that a client survey makes good sense until the completion of the survey are:

- Select a management team.
- Select clients to be surveyed.
- Create the questions for the survey.
- Select the interviewers.

- Train the interviewers.
- Conduct the survey.
- Review the results and take action.

The missing link in these steps is what to do after you learn that you have a client dissatisfaction problem. That next step is to implement a client relationship management program. A more common name is client development. Some firms call client-satisfaction programs by another name - marketing. The real challenge for most firms is to get started doing something other than talking about client satisfaction.

Clients often comment that lawyers need to pay more attention to the client's bottom line rather than their own. Client opinion surveys are unique tools for assessing the quality of the relationship with a client and at the same time determine how the client feels about the firm's contribution to the client's bottom line. Without a client opinion survey, there is no ongoing, positive way for a firm to measure the success of its service strategy and its clients' perception of that strategy.