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Initiating an Effective Client Survey Program

Reported by Chris Fritsch, J.D.

Law firm marketers who may be considering whether to survey their clients often face an interesting dichotomy: While many lawyers don't want to do surveys because they're afraid clients will think something is wrong, many clients actually welcome surveys - and are often more satisfied with firms that care enough to survey them.

"You're giving your clients the opportunity to strengthen the relationship," said Susan Duncan, during a presentation on 'Initiating an Effective Client Survey Program' at the LMA New England Marketing Conference in November. Susan Saltonstall Duncan is the President of RainMaking Oasis, Inc., a company that provides consulting for law firms. (Duncan can be reached at ww.sduncan@rainmakingoasis.com and (203) 318-0083.) Duncan said that firms often find that clients are thrilled to communicate about how the partnership can be improved.

Reasons to conduct a survey

To gain lawyer buy-in, Duncan suggested couching the survey in terms of an opportunity – and using numbers and facts. For instance, consider the following statistics from research done by Earl Sasser of Harvard Business School and Merry Neitlich of Extreme Marketing:

- 96-100% of clients interviewed say they approve of client satisfaction surveys.
- Typically only 25-30% of a firm's clients are completely satisfied.
- Such low satisfaction means that 70% or more of the firm's clients may be open to pitches from competing firms.
- 5% improvement in client retention can improve profits by as much as 25-85%.
- The probability of selling service to a new customer is 1 in 16, while the probability of selling service to a current customer is 1 in 2.
- 60% of clients interviewed in person will give a firm new business within 60 days of the survey.

These are excellent reasons to survey clients. Duncan also suggested some additional great reasons:

- To determine client service needs
- To gauge levels of client satisfaction
- To strengthen client relationships
- To increase referrals
- To prevent the loss of valuable clients
- To determine new business opportunities including cross-selling
- To understand client buying decisions
- To identify or isolate service or pricing issues
- To garner a clear perception of the firm's image among clients and in the marketplace
- To benchmark competitor practices, strengths and weaknesses
- To substantiate the viability of new service offerings, merger partners or new offices
- To gain reaction to new ideas, concepts or marketing initiatives

Define your goals

Once you have decided to initiate the survey process, the first step in preparing a survey is to define your goals and outcome procedures. Your goals will dictate who you ask, what you ask and what you do with the information. Among other things, you have to decide:

- What you are trying to accomplish?
- How many clients you want to survey - and which ones?
- Will the survey be firm-wide, by practice group, or by attorney?
- What will you do with the information?
- How will clients receive feedback?
- Will the surveys be anonymous? (Duncan noted that often clients will be more forthcoming if they know they will not be identified)

After you have defined your goals, the next step is to define your targets and methodology. First you have to decide how you will survey. Be sure to use a format that your clients will be comfortable with. Some options include:

- Written questionnaires
- Phone interviews
- In-person audits or interviews
- Focus groups
- Exit interviews
- On-line surveys
- End-of-matter surveys

Effective approaches

Each of the methods has benefits. Phone interviews are a cost effective way to get excellent information, Duncan said. They are especially effective when conducted by a third party, such as an outside consultant, because clients are often likely to be more open with them. In-person surveys are often most effective for building relationships. Focus groups are useful if you need to delve into an issue in depth, but they must be very well facilitated. Exit interviews can be useful if you lose a client or a proposal.

Additionally, there are several details that must be attended to. Written surveys should be sent with a cover letter from the senior partner and should include a self-addressed, stamped envelope and the name of a contact to call with questions or comments. For in-person and telephone surveys, a cover letter or call from the senior partner as well as a follow-up call to schedule an appointment must be made. And to increase response rates, follow-up is often necessary. Most mail surveys have return rates of around 20%, Duncan said, but with follow up that number can be increased to as much as 45%. For telephone surveys, she said, the response rate could range from a minimum of 75% to an ideal rate of around 95%. For best results, Duncan recommends limiting the length of the surveys. A phone or mail survey should take between 15 and 20 minutes to complete. An in-person interview should take from 45 to 60 minutes.

Develop the survey

The next step is to develop the survey itself. Areas to explore can include:

- Client's business objectives, trends, and industry trends
- Use of lawyers and law firms
- Selection criteria
- Clients' perception of the firm
- Satisfaction with performance of the firm, its lawyers, its services or practice areas
- Cost / billing practices
- Areas for improvement / added value
- Awareness of other services you offer
- Feedback on marketing initiatives

Once you have developed the survey, Duncan recommends test-marketing it before sending it out. Try it out with a few clients so that you can refine it and fix any problems you may find. When you're finally ready to administer the survey, more considerations come into play. First, you have to decide who will administer it. It could be a partner, the managing partner, the marketing director, a marketing consultant or a team effort. Then the interviewers have to be trained. Additionally, for in-person and telephone surveys, researching clients in advance is essential. And most importantly, a method for addressing problems and giving feedback must be developed.

Follow up

The final step is follow up. Clients must be thanked for their participation. The findings should be summarized and reviewed with the managing partner or management committee. An action plan should be developed for every client and for common problems. And a meeting with clients may be planned to address issues, explore problems, share findings, communicate about resolutions, review cross-selling opportunities, or introduce new professionals. One of the biggest caveats in doing client surveys: Don't survey your clients unless you plan to act on the results. Duncan cautioned, "If you're afraid of the answer and don't plan to act on it, don't ask." But also consider, she said, "If you aren't willing to address the issue, you're probably going to lose the client anyway."

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