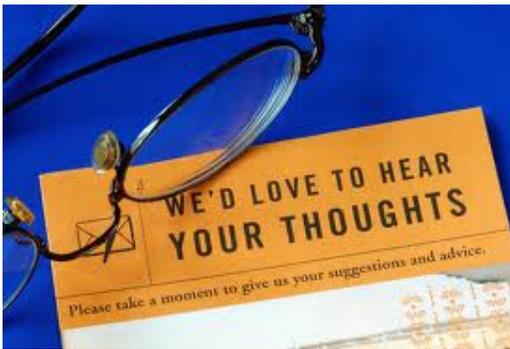


Client Feedback: 10 Steps to Determine Where Your Firm Fits on the Satisfaction and Loyalty Curve

Jan 08 Posted by [Susan Saltonstall Duncan](#) in [Client service and development](#)



In our last blog post [In 2013, Will More Firms Finally Understand that Client Feedback = Better Revenue and Profitability?](#), we discussed why it is critical to seek feedback from clients and to ensure that they are not only satisfied but extremely satisfied. Extremely satisfied clients lead to truly loyal clients who are much more profitable to firms both in the short and long terms. (Conversely, those clients who are merely satisfied are leaving the door open either a crack or a foot for other firms to woo and win them.) With so many firms still not getting this, it leaves room for firms that truly commit to a culture of client feedback to differentiate themselves and start winning (and keeping) more business.

Client feedback and needs assessments need to be part of a formal and ongoing program to assess satisfaction, identify areas of improvement as well as additional needs that clients have, and act upon those findings to continuously improve service and value. Before jumping in with a round of interviews, firms need a commitment from the top and to devise a strategy for executing it correctly. There are a lot of internal challenges and pitfalls that firms encounter if they don't take time up front to anticipate these and do it right (and will still encounter some of these even when they do.)

Step 1: Be sure you know what you are doing and why.

Your overall goal for designing an effective client feedback program is to help assess what your clients think of the services and value they receive from the firm on multiple levels. You can only improve and strengthen client loyalty if you retrieve specific insights into where you can improve.

Establishing a robust client feedback program also reflects a deeper cultural value: that your firm wants to hear from clients, engage in dialogue and work together on continuous improvement. If your firm is truly committed to this value, it will have implications for everything from the lawyers you hire, to how you train and evaluate and reward lawyers and staff (including partners,) to the investments you make in technology, knowledge management and other client-centric resources, to the approaches you take to create customized client service plans and protocols. In essence, this is a mind-set, not a one-shot approach to marketing.

Anticipate the resistance and pushback you will get from partners. The most frequent objections usually reflect partners' desire for control of relationships and not letting others in to talk to "my client," a fear that clients will think there is something wrong if you ask them for feedback, and either an insecurity or arrogance that makes partners believe they already know what clients think or they fear any negative feedback they may share.

Step 2: Establish objectives and priorities.

Ultimately to be effective, client feedback must become part of every lawyer's and staff person's daily routine, not an annual or one-time event. The methods for getting feedback will range from the very formal: annual full-day audits with clients or satisfaction and assessment interviews, to end-of-matter interviews or surveys, to online surveys all the way to the less formal interactions that everyone has on the phone and via email to gauge how things are going.

If you are new to doing this, however, you will want to be more focused in your preliminary scope and objectives. For example, a good place to start would be to evaluate the level of satisfaction the firm's top 20% clients have with the firm, assuming that as with most firms, 80% of your revenue comes from your top 20% of clients. Setting this objective will mean that you recognize the value of further deepening and institutionalizing clients as a way to retain and expand them, hence leading to better revenue and profitability.

Beware! Client Feedback programs should not be confused with cross-selling and sales efforts or other forms of market research. Too many firms go into client feedback meetings asking for more work in other areas before even establishing the level of satisfaction. Only truly loyal clients will refer you to others which is one of the critical questions to be asked at the end of an interview.

Step 3: Decide Who Will Be Interviewed and Where/How.

Top clients should be interviewed preferably in person, although some clients prefer a telephone interview. They should be given the option. Within each client organization, there may be several people with whom various people in the law firm come into contact. While not every client contact should be asked for input, any and all who have experience with the firm and are senior enough to supervise the intake and outflow of work should be included. Politically, it is often a good idea to discuss the list with the general counsel. Often a GC does not have day-to-day interaction with the lawyers and will welcome the opportunity to provide some broader feedback but will also suggest that the firm specifically speak with other individuals.

Step 4: Determine Who Will Conduct the Interviews for the Firm.

There are several considerations when deciding who would be the most effective interviewer. The options include: the managing partner or a designated client assessment partner or counsel, the Client Responsible Partner, the marketing director and/or a third party client relations consultant.

There are many drawbacks to using the partner who has primary responsibility for or contact with the client since you are trying to elicit candid feedback about performance, personnel, chemistry and problem areas. Similarly, there may be some clients who feel uncomfortable speaking with a stranger, particularly if the relationship with the primary contact partner is long-standing and very personal, however, a trained client relations director or consultant often brings the requisite objectivity and expertise to elicit the most candid feedback. An effective alternative is to use a team of partner/marketing director and consultant.

Step 5: Internal and External Research.

The partner who is the primary contact for the client should be responsible for collecting all pertinent information about the client and developing a "portfolio" of materials. This will include:

- Service history including all lawyers and staff.
- Financial history including revenue, payment patterns, write-offs.
- Client's materials including annual reports, 10K, litigation and deal reports, press releases and publicity, company marketing materials, newsletters, etc.
- Past service audit summaries.
- Client profile form including internal marketing and service initiatives.

Step 6: Client Team Meeting to Establish Game Plan.

The Client Relationship Partner should convene a meeting of the team of key lawyers currently serving the client to which the designated interviewer(s) will also attend. At this meeting, the group will review all the information gathered to date and discuss any service problems, concerns, current issues and potential opportunities. This discussion will help shape the thrust of the interview by establishing objectives and key priorities.

Step 7: Design a Good Interview Guide.

First, remember that a feedback program is intended to strengthen the firm's relationship with the client. The key word here is relationship. This does not mean that feedback interviews should be done casually over lunch to enhance the

friendship. But it does mean that the way in which the interview is conducted must serve to strengthen the partnership between the firm and the client by engendering trust and empathy. In order to solicit meaningful and accurate information, the questions and format of the survey must be carefully crafted and executed. Designing an effective interview process requires carefully sequenced and formatted questions as well as someone trained in interviewing to conduct the interviews.

Step 8: Contact Client and Set Up Meeting.

The Client Relationship Partner should write and call the client to alert him/her to the request for an interview and the reason the firm is conducting the process. The client should be given a preference for where and when to meet. The client interview provides a perfect opportunity to go to the client's site, perhaps meet others and get an updated sense of the how the business runs and its culture. Individual meetings typically are scheduled for 45-60 minute slots. In some cases, clients may choose to meet for longer periods but this should be left up to the client.

Step 9: Conducting the Interview and Immediately After.

The interview will have several components to it and will usually include the following:

- Introduction.
- Assessment interview using the interview guide. Fielding complaints and seeking clarity about confidentiality of input.
- Closing the interview including intended next steps.

Within 72 hours of the interview, the Client Relationship Partner and the interviewer should separately send a thank you note to each client contact interviewed.

Step 10: Following up.

The follow-up to the interview as well as ongoing implementation of enhancements will be the key to clients feeling the process has been a success. Within one week of when the interviewer returns from the client, the interviewer should draft a summary of the interview assessment along with recommendations for follow-up steps. If there is sensitive feedback, this should be shared first with a practice group leader and/or managing partner, then with the Client Responsible Partner. If editing of the summary was warranted, the edited version should be shared with the partners and other key lawyers who service the client, and an internal client meeting scheduled. The outcome should be a Client Action Plan which once drafted, should be shared with the client for feedback and additional ideas. In some cases, the Client Action Plan is crafted jointly in a meeting with the client and the firm. This plan should be shared with clients within one month of the visit.

Firms that are already doing this well realize the substantial benefits of formalizing feedback. They have used the information to improve and expand the specific client relationship but also have gleaned themes and lessons and suggestions that have been applied to other clients. Client feedback is used to guide strategic plans, to make wise decisions about investments like technology, project management and even lateral hires, and to help train and evaluate the effectiveness of lawyers and staff in core competencies related to skills clients deem important.

The next post will address other steps firms can take to inculcate a client service mentality and culture so that clients will become Apostles and NetPromoters!

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