



## **The How's and Why's of Conducting Client Feedback Programs**

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The verdict is in: Client feedback programs work – even in small law firms. Recent research by Touchpoint Metrics of California reports that over 30% of law firms are currently conducting client feedback programs. Another 30% of firms report they are currently developing programs. Given this, if you are not talking to your clients about how they feel about the delivery of services, there's a good chance that some other law firm might be.

Client feedback interviews support the 80/20 axiom that 80% of a lawyer's marketing time should be spent with existing clients because these interviews broaden and deepen existing client relationships. Amazing results can occur when attorneys ask their clients questions about two broad areas of the relationship:

1. What can we do to improve the delivery of our services to you?
2. Is there anything we have done during the delivery of our services that may have been a source of dissatisfaction or frustration to you?

Increasingly, the “why” behind client feedback programs is simple; they are the most effective tool to create complete client satisfaction and loyalty. Lawyers are coming to terms with the concepts of over-delivering on client expectations and delivering services based on client preferences. But, with focused training, consistency and follow-up, attorneys will benefit from the results. For example, clients tend to think of these attorneys first when a new matter is handed out. Even when a client has complained about a past service glitch, they still tend to call the attorney who has come to visit for the explicit reason that “complete client satisfaction” has been created. The reason? Service glitches or “moments of truth” allow the attorneys to own a past error or mistake (without being defensive) and commit the ultimate client service gambit—recovery!

These moments of truth are the human side of any service business. We all make mistakes. But uncovering a service error, taking responsibility for it and developing a recovery strategy with the client is fodder for complete client satisfaction.

**Will my desk be there in the morning?**

When discussing the benefits of a client feedback training program with partners, one of the first concerns in many firms is a personal one (and in some cases genuine fear). Some actual concerns expressed over the years include:

- What if the client says something that will embarrass me or the firm?
- What have I done that the client might be unhappy with?
- What if they never hire me again?
- How will this impact my bonus?
- What if we discover something really bad and I'm asked to quietly leave the firm?
- What if the client doesn't like the interview process?

Literally, every client feedback interview in which we have been involved has had a happy ending. The bottom line is that clients enjoy the interviews IF they are conducted with a sense of genuine concern and if the interviewer (lawyer) follows up in a timely and appropriate manner. Nothing annoys a client more than a lack of follow-up. If a problem surfaces, the lawyer must get back to the client promptly and with a recovery strategy in mind.

This is not to say that we do not hear constructive feedback or in some instances negative feedback from clients. However, these moments of truth have provided the information needed to make a stunning recovery. This is where client loyalty and satisfaction grow.

### **What is the best way to conduct these Interviews?**

It has often been said, *"It is only important to interview the clients you want to keep"*, which is a little tongue-in-cheek reference for considering which are your most important clients. The first step is to select a reasonable number of clients to interview. If this is your first foray into the client feedback process, you will want to budget additional time needed for long-term follow-up. We recommend starting with three of your most important clients.

These meetings create an excellent marketing opportunity to bond with clients. However, this is not a time to pitch for new business. This meeting is a face-to-face chance to meet with your client in a non-billed setting in their office to explore service delivery issues – only.

### **Who should do the interviewing?**

We recommend that you set the stage with clients ahead of time. If the client knows you are coming to see them to find out ways to improve the delivery of legal services, they are usually quite candid. We suggest you tell them that you would appreciate their total candor in this meeting and that you want to work with them to create complete client satisfaction.

With that said, some attorneys are uncomfortable asking their own clients these types of questions. There are several options:

1. Ask another partner of the firm to go in your stead as the "Client Services" partner of the firm.

2. Go as a team with another partner to increase objectivity, better note-taking, and better listening in the meeting. (Our preference.) We do not recommend more than two people attend in most circumstances.

### **The process**

During the interview, listen 70% of the time. That means listening “actively” and reflecting back what you heard. Take time to ask follow up questions to get greater detail. Steer away from closed questions requiring simply “yes” or “no” responses. Consider the questions listed with this article. Take copious notes and let the client know that what they are telling you is so important you are writing it all down so that you don’t miss a thing. Most lawyers find that active listening training greatly benefits them. This is not a deposition and a specialized means of conducting the interview is required.

### **The follow up**

Send a thank you note within 48 hours of the meeting. Highlight any “moments of truth” discovered in the meeting. Provide a summary of key points discussed and agreed-upon action steps. Let the client know that you will be back in touch with them and what you plan to do to recover from any service glitches that may have come up. In our experience, 98% of the glitches are fairly easy to plan strategies for recovery. ***This recovery process is what creates complete client satisfaction and loyalty on the part of the client.***

If you decide to push this idea once again to the corner of your mind, just remember our favorite adage: ***Someone is talking to your clients. Is it you?***

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\*Merry Neitlich and Anne Gallagher of Extreme Marketing have been providing training on the client feedback process and conducting interviews for law firms for nearly 20 years. Additional information about the process can be found in articles at [www.emconsults.org](http://www.emconsults.org).

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**Sample Interview Questions** *(Some redundancy is built in to give options to the interviewer.)*

1. What aspects of the services we are delivering to you (your company) are working well? (Or – What should we keep on doing?)
2. Is there anything we could do to improve the way we have been working with you? (Ask about: collaboration, goal setting, creating legal strategy, frequency of strategy sessions, corporate policies we may be unaware of, cultural issues, etc.) Is there anything we should stop doing?
3. Have we ever miscommunicated with you or are we unaware of any service problems that may have occurred in the past?
4. When a piece of litigation (real estate, transactional matter, etc.) comes in, what is most important to you in deciding which outside firm to hire?
5. It seems that many companies we have worked with feel frustration that their written service guidelines are not always followed precisely. Are you experiencing that as well?
6. What are the most important aspects of client service to you?
7. What are your preferences in the delivery of legal services? (Communication, memos, technology, strategizing on matters, responsiveness, fee alternatives, etc.) What does it take to create complete client satisfaction in a relationship with an outside law firm?
8. What should an outside firm avoid doing? (Or, what should we stop doing?)
9. When there is a service glitch, do you generally take the initiative to discuss it with the firm?
10. What aspects of technology, if any, are most important in working with outside firms? (i.e., e-mail, secured documents, shared software, law firm extranets, etc.)
11. What additional information would you need about our firm for us to be considered for (additional) future work or to get on the short list for your next proposal? What are your selection criteria?