

Exceptional Client Service In Law Firms

Surveying Your Clients

By John W. Olmstead, MBA, Ph.D, CMC

This is the **decade of the client**. Clients are demanding and getting - both world-class service - and top quality products. Many law firms have spent too much energy on developing new clients and not enough retaining old ones. For many law firms, obtaining new work from existing clients is the most productive type of marketing.

Therefore, more firms are **developing and using client satisfaction surveys** to obtain feedback about their client's satisfaction or dissatisfaction with the attorneys and staff who serve them, the timeliness, responsiveness, and value of work performed, the need for additional services, and whether they would use the firm again and refer the firm to friends and associates.

Our firm recently completed client satisfaction telephone interviews for several of our insurance defense law firm clients. Here are a few quotes and a summary of what these insurance company law firm clients told us:

§ We want to work with proactive attorneys that aren't afraid to try cases.

§ Limit the number of people working on a file. I like consistent assignments.

§ I expect attorneys to get back to

me by the next business day.

§ I like one partner and one associate per file.

§ Most of our billing problems with law firms are due to excessive use of associates time.

§ I get upset with attorneys that want to settle right before trial.

§ The primary reason that we terminate our relationship with our outside attorneys is not reporting to us in a timely fashion and poor communications.

§ I find that many lawyers are poor at managing their files and have poor basic communication skills. I work with lawyers that can do both of these things well.

§ I think that it is important that law firms provide value added services such as newsletters, legislative updates, e-alerts, seminars, etc on a "no charge" basis. Most law firms provide these services these days. Such services help us do our jobs better, improves communications and the overall relationship between our organization and the law firm, keeps us up to date on changes in the law, and helps the law firm stay abreast of emerging needs in our business.

§ I will pay higher fees to lawyers that aren't afraid to try cases.

The feedback obtained from these surveys formed the cornerstone of service improvement programs, which are currently

being implemented by these law firms.

Much can be learned by talking to your clients. Structured telephone interviews and other forms of surveys conducted by a neutral third party can provide many surprises as well as answers. **Client satisfaction surveys can be the best marketing investment that you can make.**

Our law firm clients have found their clients to be impressed that the firm cares about their opinions. It is good business to listen to your clients. Understanding what bugs people about your services and those of your competition can be the most valuable input to strategy development you can get your hands on. **Find out what bugs your clients and you will learn to out-think and out-service your competitors.**

Before you invest any time, money, or effort in developing an overall strategy for service improvement, you must survey your clients to understand what your clients want and expect from your firm. An initial survey helps you identify the starting point for your service improvement journey.

Planning The Survey

The type of survey that your firm chooses depends on your purpose for doing the survey. Are you looking for some insight into why you've lost clients? Are you interested in getting a general idea of how your clients feel about your firm? Following are some of the basic types of surveys that you may want to consider:

§ Random Client Survey or Census

These surveys are used to measure overall client satisfaction and highlight any widespread service problems and identify new business opportunities. A random survey involves selecting a percentage of your clients (sample), contacting them by phone, mail or in person (or a combination of all three), and asking them to evaluate the services they receive from your firm. A census involves surveying all clients rather than taking a sample.

§ Lost Client Survey

This type of survey is used if your firm wants to know why you have lost a particular client or group of clients. With this survey interviews are conducted (usually by telephone or in person) with clients that no longer do business with your firm. Let the client know that you are sorry that he or she is no longer doing business with your firm and that you are interested in learning from your mistakes. Understanding your client's reason for leaving will help you make improvements for future clients. One of the greatest benefits for this type of survey is that you are often able to discover the specific reason a client

left.

§ Key Client Survey

Rather than doing a random survey of your client base, you may want a more targeted and focused survey of a particular client group. For example, if 80 to 90 percent of your business comes from ten clients, you may want to create a survey that is specifically targeted to them. The advantage of a targeted key client survey is that it is limited in scope and precisely focused. Before you commit time and resources to a client survey identify your purpose and establish specific goals and objectives. Develop a survey plan. Insure that a follow-up strategy is incorporated into the plan.

Survey Method

Survey methods are simply the different ways that you can use to collect feedback from your clients. The four main methods are:

§ Written Questionnaires and Online Surveys

This method involves a one-to-four page document that poses a series of specific questions tailored to the needs of your firm and addressing specific concerns and business opportunities of the client group that you are surveying. The questions should consist of a mix of closed and open-ended questions. Closed-ended questions should be designed to facilitate statistical compilation and presentation.

§ Telephone Surveys

This is our favorite method, which we use most often in our work with our law firm clients and it offers very rich insight and action-orientated feedback.

A telephone questionnaire is used which is quite similar in design to the written questionnaire described above which contains both "ask and answer" and "discussion" questions.

§ Focus Groups

Focus groups are groups of eight to ten of your clients who come together, at your invitation, to answer service-related questions that are prepared by you and presented by your moderator. Because of the group dynamic, focus groups usually provide a lot of rich feedback in a relatively short period of time.

§ Face-To-Face Interviews

When you want to get the most anecdotal information from your clients in the most personal format, use the face-to-face interview method.

Although it takes a little more work and coordination, you get the best survey results by using a combination of different survey methods to poll your clients. We find that combining telephone interviews with mail surveys provides the best mix of general and specific feedback, as well as qualitative and quantitative data.

Action Plan and Follow-Up Strategy

There is nothing worse than asking clients for feedback and then doing nothing and not following up. The benefits of gathering feedback can be negated if you do not follow through on the results. Once your firm has taken the initiative to actively invite feedback, you must take actions to correct at least some, if not all, of the problem areas identified. Doing so is vital. You must

also act on business opportunities identified as well. Going to the effort of gathering the information and then not doing anything about the problems identified is not only a waste of time and money but can also increase the likelihood that future service improvement efforts will be viewed with skepticism. For this reason, you must close the loop on the surveys you have conducted by getting back to the people who provided you with the feedback. Doing so benefits your relationship with your clients because you not only confirm what they said but that you are making changes accordingly.

Good luck on your journey.

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The firm helps law firms implement client service improvement programs consisting of client satisfaction surveys, program development, and training and coaching programs. Their coaching program provides attorneys and staff with one-on-one coaching to help them get “unstuck” and move forward, reinventing both themselves and their law practices.

Founded in 1984, Olmstead & Associates serves clients across the United States ranging in size from 100 professionals to firms with solo practitioners. Dr. Olmstead is the Editor-in-Chief of “The Lawyers Competitive Edge: The Journal of Law Office Economics and Management,” published by West Group. He also serves as a member of the Legal Marketing Association (LMA) Research Committee. Dr. Olmstead may be contacted via e-mail at john@olmsteadassoc.com. Additional articles and information is available at the firm’s web site: www.olmsteadassoc.com

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