



It's a Buyer's Market: Make Sure Your Clients are Happy

By Terrie S. Wheeler, MBC

At one time or another, most law firms will gather around a conference table to brainstorm creative ways in which to unseat their competition and entice clients to move work to *their* firm – and away from yours. The primary reason for these defections? Clients' perceived lack of client service, lack of responsiveness, and an overall attitude of complacency on the part of the incumbent law firm. Consider this true story.

A True Story About Client Satisfaction

A partner I once worked with gathered his team together to tell them the difficult news that their primary client was considering moving its work to another law firm. The purpose of the meeting was to brainstorm ways in which to retain the client by identifying how the team could provide better service. The hour-long brainstorming session resulted in innovative and creative ways to keep the client better informed on the status of their matters and cases, how to more efficiently bill their time, how to build stronger internal relationships with the client, how to be more responsive when the client calls, and a long list of other client-focused ideas. Thrilled with the commitment of his team, the lawyer then said, "Just kidding. The client is not going to fire us. But why aren't we already doing these things?"

Bottom line? Don't wait for clients to become disgruntled. Nip possible client service issues in the proverbial bud. Actively solicit feedback from your clients. One of the biggest benefits of asking for feedback is that your client knows you take client satisfaction seriously and that you want to improve the little things, which, combined over time, can lead to client dissatisfaction. Remember that clients are less likely to tell you about service-oriented issues. They will just be more open to that new law firm trying hard to get the client to change firms.

How to Gather Feedback

There are many ways to gather feedback from clients. An organized client satisfaction initiative is the best. First, identify what you want to learn from your clients. Broad survey topics include:

- Overall reputation of the firm and its practice areas.
- Professional expertise.
- Billing rates, fees and clarity of billing statements.
- Proactive approach to handling client matters.
- Perceived value of services provided.
- Accessibility, timeliness and returned phone calls.
- Working relationships with other professionals in firm.
- Communication style/keeping the client informed.
- Responsiveness to email messages.

- Telephone and voice mail system effectiveness.
- Ethics and integrity of professionals.
- Inspiring trust and confidence.
- Creativity and problem-solving on complex business or personal issues.
- Your client's perception of competitors.
- How the firm might expand its representation of the client.
- The firm's greatest strengths.
- The firm's opportunities to improve service.
- How effective firm communications are (website, newsletters, seminars, etc.).
- Overall client service rating of firm professionals and staff.
- Likelihood of your clients to refer more business to you and your firm.

Client Survey Options

Web-based Surveys – Online client satisfaction surveys are easy to develop, customize, distribute and analyze. Generally clients with an existing relationship with your firm will be more likely to respond. This option is good for sampling a large group of clients. However, Web-based surveys lack the personal touch of the methods below. You can also ask clients to provide a testimonial that you could use on the firm's website.

Telephone Interviews – Great for sampling a few select clients regarding specific, in-depth matters, this method requires a greater personal investment of time and polished communication skills. With this option, there is room for follow-up and clarification in addition to personal attention to specific client concerns. It may not be practical for large-scale information gathering. In telephone surveys, the interviewer must ensure the integrity of the interview process by maintaining the agreed upon timeline, yet asking each question on the survey.

In-person Interviews – The most time-intensive and high-touch of all client survey methods, this option is great for obtaining detailed information from select A-level clients by providing an opportunity to share their thoughts and feedback with a live person. Interviewers must possess impeccable social communication skills as well as a thorough understanding of survey content and purpose. Costly but potentially the highest return.

Focus Groups – Conducting a focus group with select current or prospective clients is a great way to solicit feedback on a new service or practice group before launching a full-blown marketing campaign. The focus group environment allows participants to react and respond real-time to predetermined questions. Focus groups generally benefit from having an outside moderator/facilitator lead the discussion.

Which Format Is Right For Your Firm?

Each client survey format has pros and cons. Given your timeline, budget and information needs, one survey may be more effective for you versus another at any given time. It is important to have a process in place that includes:

- Select the clients you want to survey. Try to be objective and not just select clients you know will say great things.
- Let those selected know they will be receiving a (link or

call) to a survey, and how long it will take them to participate or respond.

- Develop a cover email letting clients know how much the firm values their opinion as it seeks to deliver exceptional service. If the survey is Web-based, make sure you identify a deadline.
- Analyze the results and present to the firm.
- Thank participants and communicate results. Clients like to know that they are not alone in singing the firm's praises.
- Develop an action plan to implement findings.

Before committing to a client satisfaction initiative, make sure the firm is ready to take action on the responses. If there are serious client service issues the firm must be committed to take action to address the problems. If clients see you asked them for feedback then did nothing to change, it can have a very negative impact. Many firms are concerned about asking clients for feedback thinking no news is good news. However, in this competitive climate, it is far better to address client satisfaction proactively. In general, clients are happy you asked for their opinion.



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