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Client satisfaction surveys: Choosing the right clients and creating your questions

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The goal of your satisfaction survey is to strengthen client loyalty and stimulate new business from existing clients. To be most effective, you need to select clients who provide the greatest potential increase in the value to the firm and you should identify survey questions that accomplish your goals.

Select the right clients

When conducting a satisfaction survey, lawyers often make the mistake of targeting clients who they suspect are unhappy. This is not to suggest that you ignore them. In this situation, address the problem directly and not position the discussion as a survey but rather as an effective way to improve the relationship. Discuss the matter fully and fix the problem.

In addition to the disgruntled client, it is recommended that you not survey a client who is by nature never satisfied no matter how often you try to accommodate them. There is no point.

Because your survey effort will take time and resources, it behooves you to prioritize your list of clients wisely. Here are three categories of clients to consider:

- *Your biggest clients*

Clients that generate the largest source of revenue for your firm are the easiest to identify. And because they are your primary assets, it is essential to make sure they are happy and their expectations are being met.

- *Your clients who have the greatest potential for growth*

With certain clients you know there is an opportunity to expand the relationship. Perhaps a client has needs of which they are unaware, or they may be at risk in areas they have not considered. Furthermore, you may have expanded into new practice areas that could serve your client but your client does not know this.

Many lawyers feel discomfort at the notion of pitching other services to a client when the client has not expressed the need. One benefit of satisfaction surveys is that they may help clients realize they have additional needs. And positive survey results afford an opportunity to cross-sell additional services, appropriately and honorably.

One effective technique to cross-sell is to discuss survey responses with your client after the survey has been completed. Refer to the specific needs they have mentioned. Discuss those needs and how you or your firm could be of service.

An example of this is the client who, while answering a survey question, added, "We're pleased with the matters they've handled, but there are just a lot of times when we can't use them because we do a lot of distributorship litigation, and that's not what they offer." In fact, the client was mistaken. He did not know the lawyer had colleagues in the firm who could handle such matters. The satisfaction survey created an opportunity to educate the client and further discuss how the firm could be of greater service.

- *Your clients who are well-connected*

For marketing, one question lawyers often ask is "How do I meet new prospects?" An effective way to meet new people is by leveraging existing relationships. You may have clients who know a lot of people — they may sit on boards of trade organizations and charities. Others may be well known in their field of expertise, while some are simply good networkers. Each has the ability to introduce you to their contacts.

However, many lawyers are uncomfortable calling a client out of the blue and asking for an introduction. A client satisfaction survey can set the stage to comfortably and appropriately ask for an introduction. Glowing feedback is a marketing opportunity that should not be ignored.

For example, one managing partner of firm uses the following strategy: "I call the client a week after they've done the survey. I acknowledge how pleased I am with their positive feedback and I ask if they would be willing to act as a reference. Once they say yes, and they always do, it's easier for me to then say, 'You know, I'm expanding my practice and I need to meet new people. Do you know any persons I should be meeting or do you have any thoughts on organizations I should join?' Then I let my client respond in a way he or she feels comfortable. Often they say, 'Sure, I know someone you should meet.'"

Create your survey questions

After you categorize and prioritize the clients you wish to survey, the next step is to create the questionnaire. Because the purpose of your satisfaction survey is to capture detailed feedback regarding key aspects of your service and identify new business opportunities, keep the following tips in mind:

- *Craft questions that reflect your differentiation*

When asked, "What aspects of your service make you superior to the competition?" lawyers seldom have a meaningful answer. Many lawyers haven't taken the time to consider all of the specific benefits they deliver to their clients.

One of the benefits of creating satisfaction survey questions is that it forces you to identify your specific service standards. To help you compose your questions, consider the following:

What quality standards make me (our firm) superior to the competition?

What are the standards by which I (our firm) want to be judged?

What quality standards have my clients commented on in the past? (These standards are most likely important to them.)

For example, you could create a survey question that asks about your responsiveness, or your ability to explain complex legal issues in layman's terms, or the accuracy of the work, or any other specific qualities that distinguish you from the competition.

Not only do you want to insure these standards are being met, but you also want your clients to be reminded of your differentiation. When clients recognize the specific ways you are superior to the competition, they know they are getting superior value.

- *Create satisfaction questions, not marketing questions*

Many firms offer what is labeled a "satisfaction survey." In truth, however, it is a marketing survey disguised as a satisfaction survey. It is misleading to the client when, after claiming your intention is to get feedback on your performance, you proceed to ask questions about your website, branding, firm logo, or come right out and ask for more business.

For example, a satisfaction survey question might be "How would you rate our ability to meet deadlines?" while a marketing survey question would be "Would you refer our services to others?" Clearly, the first question is gauged to measure satisfaction, whereas the second is asking the client to help you sell your firm.

Sample satisfaction survey questions

On a scale of 1 to 10 (10 being the best)...

1. How would you rate (firm name) on understanding your needs?

2. How would you rate (firm name) with regard to the quality of advice you receive?

3. How would you rate (firm name)'s responsiveness?

4. How would you evaluate the firm's ability to meet deadlines?

5. How do you perceive the value that you are receiving from (firm name)?

6. How would you rate the legal expertise of the lawyers assigned to this matter?

7. How well were you treated by the staff-members who worked with you?

8. What can we do to be of better service to you?

While there is value in conducting a marketing survey, marketing survey questions should not be asked while conducting a client satisfaction survey. You do not want your client to feel that your actions are insincere or deceptive.

- *Keep the length of each question fewer than 20 words*

Short and straightforward sentences are best. Choose your words carefully. If the question is not concise and precise, your clients may interpret it differently. As a result, analysis of their survey scores will be meaningless or misleading. A succinct question also lessens the chance that your clients will have to reread it or have it repeated to them.

- *Make sure each question represents only one issue*

A question should not ask, "How would you rate the quality of our advice and our responsiveness?" Bringing up more than one concept may confuse the client. Furthermore, should the client respond with a score, and no explanation, you will not know to which issue they are referring.

- *No leading questions*

A leading question is one that attempts to guide the client's answer. For example, a question should not ask "Wouldn't you say our firm meets deadlines consistently?"

- *No double negatives, abbreviations or slang*

Survey questions must be easy to understand. You do not want your clients to have to ask for clarification. Avoid using abbreviations, acronyms, jargon or slang.

- *No more than 10 questions total*

The survey experience for your client should be pleasant and require no more than five to 10 minutes to complete. Of course, you are hoping that your client expounds upon their answers and provides meaningful feedback, but you want to demonstrate that you take your client's time seriously.

- *End with an open-ended question*

The value of an open-ended question is that it gives your client the opportunity to express any final thoughts. For instance, asking the question "What can we do to be of better service to you?" is a highly effective method to uncover issues that have not been discussed. Open-ended questions can also help you identify opportunities to expand the relationship.

Targeting the right clients and precisely designing your survey questions will make you more strategic in your survey approach. You will have greater clarity as to your survey goals and you will feel more motivated to move forward with your implementation.

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