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Client satisfaction surveys: How to conduct them, who should conduct them, and techniques to get qualitative feedback

Law Firm Management

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To maximize the value of your client satisfaction survey, you should be strategic in its implementation.

Everything you do should be designed to enhance your ability to gather qualitative feedback. Candid, detailed responses will help you address problems with effective solutions and recognize opportunities to increase profitability.

This article discusses survey methodologies to consider as you move forward with your implementation.

How to conduct the survey

There are three ways to conduct surveys. Here are the pros and cons of each.

• *In-person client interview* — There are several advantages to conducting a survey in person. A face-to-face review demonstrates a serious commitment on your part.

It also provides an opportunity to discuss issues in greater detail than a phone or mail survey. Conversation of this depth gives you a chance to show empathy and helps to build the emotional bond with your client, which can only strengthen client loyalty.

An in-person interview does require time and money if you have long-distance clients. Thus, you may want to reserve this effort for your largest and most important ones.

Another disadvantage to in-person interviews is that candid responses from the client and the comfort level of the servicing partner may be compromised. Having a marketing director or outside third party conduct the survey can allay these concerns.

• *Phone survey* — Compared to in-person surveys, phone surveys are less expensive, less time-consuming, easier to schedule, and effective for select groups of clients.

However, it can be difficult to detect emotion, as the surveyor is unable to see the client's facial expressions or body language.

• *Written survey* — The last way to conduct a survey is by simply presenting the questionnaire to your client via mail, email, or the web. This requires the least amount of time to implement and is the most cost-effective method for getting quantitative data from a large number of clients.

As an aside, the option of anonymity afforded by a written survey may be seen as a benefit. In fact, it is a waste of time for both you and the client since you would have no way to effectively respond to their specific issues.

The biggest drawback of a written survey is the low response rate, which research indicates is between 5 - 30 percent. It makes sense that clients would give a written survey less attention than if an individual were there to ask the questions.

Furthermore, surveys that come back seldom contain meaningful feedback. For instance, if a client gives a rating of "7" (out of 10), but adds no comment, you have no idea why. Survey responses that lack specific examples or explanation are meaningless.

Who should conduct the survey?

Because your intention is to elicit candid responses, it is important to consider carefully who best to carry out the survey. There are three categories of individuals who can do this.

• *The servicing partner* — When the attorney in charge of the account talks with their client directly, and both sides work together to improve the relationship, it is an emotionally bonding experience. Interaction of this sort can dramatically strengthen client loyalty.

However, the servicing partner may not want to conduct the survey. Many lawyers are uncomfortable at the thought of hearing criticism. If a lawyer does not handle criticism well, he should not conduct the survey. An ill-at-ease lawyer will avoid asking the hard questions and may be incapable of hearing feedback accurately.

Just as it is with the lawyer, the client may be uncomfortable being candid in front of the servicing partner. This is a common problem and many clients prefer to speak to an individual who is not directly involved.

Another downside of the servicing partner conducting the survey is that any criticisms will need to be addressed immediately. Alternatively, if someone else conducts the survey, the servicing partner will have time to review the feedback and come up with a strategy to respond.

• *Another representative of the firm* — Your firm's marketing director, director of client relations or director of business development could conduct the survey. In smaller firms or where there is no marketing person, the legal administrator may take on the responsibility.

The benefit of having someone in-house do the survey is that they may well have an understanding of the relationship history and other staff members who have interaction with the client.

• *An outside third party* — With certain clients, you may want to delegate the survey responsibility to an outside third party. Clients will be more inclined to be candid to an outside person because of the perceived objectivity.

In an effort to get more comprehensive feedback from key clients, the surveyors mentioned above may want to combine forces.

One marketing director at a mid-size law firm said that she accompanies the servicing partner to the client's office, and they both conduct an in-person interview. The rest of their clients are surveyed via telephone by an outside consultant.

A marketing director at a large firm who had attended many survey interviews with different servicing partners was able to spot trends that the individual partners did not notice. Her participation gave her the ability to address firm-wide issues.

You need to decide, with each client, what is the most effective approach. What approach is going to give you the most detailed feedback? What is going to make your client most comfortable? What is going to give you the greatest value?

Techniques to get detailed feedback

It is time to conduct the survey. A written survey requires minimal effort: You provide the questionnaire and then collect the results. If, however, you are doing an in-person interview or phone survey, your approach should be designed to elicit detailed feedback.

Here are some tips to help guide your efforts.

• *Thank the client at the beginning and the end* — Bookend your survey interview with a brief thanks. This demonstrates that you value the client's time as well as their input. If an outside party conducts the survey, he should thank the client on behalf of the servicing partner or the firm.

• *State your intent and the instructions* — Remind the client what the survey is for. For example: "Because we value this relationship, we want to get your feedback on our service and make improvements wherever can."

Then provide instructions so the client knows what is expected of them. For example: "I'm going to ask you seven questions. The first six questions ask for a score on a scale of 1 to 10, 10 being the best. As you score our service, please feel free to elaborate with examples or explanations that will help us/the firm understand your score. The last question is opened-ended for you to offer any additional thoughts or suggestions."

• *Encourage the client to be candid* — For satisfaction survey scores to be meaningful, they must include an explanation or justification for each score. Only with detailed feedback can you then address problems with clear solutions.

If a client says they have nothing further to add, do not push. Simply move on. The survey should be a pleasurable experience, not an interrogation. Often, the client will become more forthcoming as the survey continues.

Sometimes people need permission to be candid. Generally, a client will be encouraged with phrases like, "The firm values your opinion and they want you to be very candid. Any examples or specific instances would be really helpful."

If a client answers a question by giving only a numbered score, repeat that score back to them and add, "Now what would make it a '10'? Can you give me any examples? They want you to be very candid."

• *Allow for silence* — It is normal for a person who has not seen the survey questions in advance to pause before answering. Wait patiently. This is an opportunity for the client to get clarity about their experience and provide substantive input.

Also, apply the 15-second rule. If, after you ask a question, 15 seconds passes without so much as a peep, suggest that "we move on and come back to the question at the end of the survey."

• *Have clarity before you move on* — Although the client may completely understand the reasoning behind a response, their explanation may not be clear. If there is any doubt as to what the client is really saying, ask them to elaborate or site a specific example that illuminates their point.

A reliable technique is to say to the client, "I want to make sure I understand. What I'm hearing you say is ... ." The client will either agree or correct you.

Using a strategic approach to your survey implementation will dramatically increase the value of your feedback. As a result, you will have greater clarity on how to respond.

[Author's Note: The next installment will discuss how to follow up on both positive and negative survey results and give techniques for turning positive feedback into more business.]

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