Strategies | 09.08 V10.N08
The Journal of Legal Marketing
PUBLISHED BY LEGAL MARKETING ASSOCIATION LMA®

RETAINING CLIENTS IN AN UNCERTAIN ECONOMY: PART II

Getting Qualitative Survey Feedback and Responding to Your Reconnaissance

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Editor's Note: Part I of this series, "Strategies for Planning and Executing a Satisfaction Survey," appeared on page 12 of the August issue of "Strategies."

A well-executed client satisfaction survey yields qualitative feedback. Candid, detailed responses let you address problems and recognize opportunities to increase profitability. Unfortunately, lawyers are notorious for not responding to their reconnaissance. To help with that situation, here are guidelines to effectively conduct satisfaction survey interviews and strategies to follow up on both negative and positive survey responses.

Interview Tips to Obtain Qualitative Feedback

Thank the client at the beginning and end of the survey. This demonstrates that you value the client's time and input.

Communicate your intent and instructions. Remind the client of the reason for the survey. For example: *"Because we value this relationship, we want your feedback on our service to help us make improvements."* Tell the client how many questions will be asked and explain the scoring/rating scale.

Encourage the client to be candid. Tell them that you want detailed, candid feedback. Sometimes people need permission to be frank. Use phrases such as *"The firm values your opinion and wants you to be candid. Examples and specific instances would be really helpful."* If the client still withholds comments halfway through the interview, kindly remind them again, but do not push beyond that. Usually clients become more forthright as the survey continues.

Get an explanation for each score. When the client gives a numbered score/rating with no explanation, repeat the score and add, *"Now, what would make it a perfect score? Can you give me an example?"*

Allow for silence. It is normal for a client who has not seen the questions in advance to pause before answering. Wait patiently. If the client has no response, offer to come back to the question later.

Have clarity before you move on. If there is doubt as to what the client is saying, ask him or her to elaborate or cite an example.

Respond to Negative Feedback First

It is important that you take your client's preferences and problems seriously. The lawyer must follow up on all survey responses. Legal marketers can maximize follow-up efforts by working with the lawyer to create an action plan.

If the servicing partner personally conducts the survey, negative feedback should be addressed immediately. If a solution is not apparent, the lawyer should paraphrase the issue back to the client, which demonstrates understanding, and say, *"I want to problem solve with my team and get back to you with solutions within 24 hours. Is that okay?"*

A written plan of action should always follow each result. Create a report. Prioritize key issues. Detail the next step to address each issue. Have a deadline. The following steps can help guide you in your follow up:

Personally call the client within 24 hours. It has more meaning if the servicing partner, rather than another firm representative, calls the client directly. If the complaint is severe, the partner should offer to meet with the client.

Tell the client that you appreciate the candid feedback. The goal is to encourage ongoing, forthright communication.

Clarify their perceptions. If a survey score or comment does not make sense, ask the client to elaborate so you may fully understand.

Apologize and make an offer to recompense. An apology without an offer to make amends may not be enough. Ask yourself, *"What is it worth to keep this*

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client?" and consider an equitable recompense. For instance, a firm that made a substantial error may offer to deduct 10 percent off the fee for the client's next matter.

Negotiate how repairs will be made. Offer several options to repair the problem and get agreement so the client has a clear understanding of what will happen next. Negotiation shows that you have given your client's feedback considerable thought and demonstrates flexibility on your part.

Make sure your team commits to the changes. If other members of the firm interact with the client, confirm that they understand and commit to the new service policies.

Calendar a follow-up survey. A follow-up survey demonstrates your sincerity and helps to determine if the installed changes are effective.

Common Issues of Dissatisfaction and How to Respond

A lack of responsiveness. Attorneys are notorious for not returning calls and emails promptly. First, clarify the client's expectations. Then, specify how responsiveness will be improved. For example: *"I will return your call by five o'clock the same day. If I'm not available, my assistant will call you before five and schedule a time to talk within 24 hours. Will that work?"* Negotiate an agreement.

Confusion over billing. Sometimes a client is unable to understand the bills or feels there are inaccuracies. Schedule a time to review the bill together. This is an opportunity to remind clients of the value they are receiving, including added value services for which they are not being charged. If the client complains about rates, he or she is not aware of all the benefits that you bring. Constantly consider how to increase your perceived value. Also, consider offering a periodic status report on all activities, fees and potential fee increases.

Understanding the client's goals. If a client feels the attorney is not up-to-speed on business goals, the attorney should visit the client's office, meet with key decision makers and discuss short and long-term goals. It's important to communicate how the firm can help the client achieve these goals.

Understanding the client's industry. Don't assume your clients are aware of your industry expertise. Demonstrate your knowledge by doing seminars and taking a leadership role in the industry's trade organizations and publishing articles in the trade journals.

Complaint about a staff person or partner. Clarify the reason for the client's dissatisfaction. Is it based on one incident or an on-going personality conflict? Determine available options, such as introducing another partner or staff member to the client. If you do not have that option, change the behavior.

Leverage Positive Feedback

A positive survey result gives the lawyer an opportunity to cross-sell services. Glowing feedback also sets the stage to appropriately ask for referrals. Consider the following strategies:

Personally call the client within one week after receiving the feedback. Thank clients for their feedback and let them know how pleased you are. Given their high approval, let them know that you have thought about how the firm might be more helpful. Offer to discuss other services the firm provides. A happy client is rarely opposed to learning more.

Ask the client to be a reference. When you thank the client for glowing feedback, consider asking if he or she would act as a reference and/or provide a testimonial. Happy clients usually oblige. This request lets the client know that you are looking for more business, and prompts the client to think about contacts he or she could send your way.

Ask for an introduction. After thanking clients for their positive feedback, remind them that your firm is looking to expand and ask them for *guidance* on how you might meet new people. They may invite you to a networking function or offer an introduction. This indirect approach is a respectful way of broaching the topic and allows the client to respond in a way that is comfortable for each individual. Getting qualitative feedback from your clients and being strategic in your survey follow up will dramatically strengthen your client relations and maximize profitability. ■

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