How and why to conduct a client survey

By Sally J. Schmidt

At a conference recently, I listened to a panel of clients talk about their relationships with outside counsel. Their comments included:

- “Don’t send me a bill with a rate increase if you haven’t talked to me first.”
- “If you want to give the work to an associate or paralegal, call me in advance.”
- “Tell me if I have a bad case. Don’t work it up for trial only to say it’s a loser at the last moment.”

As often happens when listening to clients, I was struck by the simplicity of their requests. Yet there are many times when lawyers are out of step with their clients. Many malpractice claims are a result of poor client communication, so that is an obvious risk to a firm. But just as devastating is the potential loss of clients because the law firm is not meeting their needs.

It isn’t difficult to find out what clients think or want; you only need to ask them.

How to Conduct Client Surveys

There are two primary methods for conducting client surveys:

1. **Interviews.** Interviews can be handled in-person or by telephone, and conducted by third parties, the primary attorney or another firm representative (e.g., the managing partner). Each option has its pluses and minuses.

2. **Surveys.** Surveys can be done in paper form or electronically. While they are less expensive to administer, they are also less personal and may elicit an anonymous (or no) response.

The method you select should depend on your objectives, your clientele and your budget. If, for example, you are an estate-planning lawyer and have literally hundreds of clients, each representing a small amount of revenue, you might opt for a written survey. This should allow you to reach a lot of people in a cost-effective way. If, however, you are a corporate lawyer with a few key institutional clients, an interview will signal how important the client is and allow for an in-depth and qualitative conversation about the relationship.

Importance of Follow Up

Perhaps the key to client surveys is to understand that they are the beginning, not the end, of the process. After clients express their opinions, they usually expect some follow up. This should include, at a minimum:

- Thanking the client for taking the time to participate.
- Following up immediately on opportunities, concerns or suggestions.
- Sharing key messages with the entire client service team.

What if you get negative feedback? View it as a gift. If a client expresses a concern, this provides an opportunity to improve the service and, even more important, the relationship.

Conclusion

Research shows a direct link between client engagement and client loyalty. Loyal clients tend to use more services and are better promoters of the firm. A client survey is an excellent way to engage clients and let them know their opinions, and relationships, matter.

Sally J. Schmidt, President of Schmidt Marketing, Inc. in Edina, Minnesota, has worked with more than 400 law firms on their marketing, business development and client service programs. The first president of the Legal Marketing Association, Sally has an MBA in marketing and is the author of two books on law firm marketing. www.schmidt-marketing.com

Tip Jar

Join us for our upcoming free CLE webinars:

September 24, 2013:
Ethical Marketing and Client Relations
12:00-1:00 p.m. CST

October 24, 2013:
Intake Procedures-Unleash Your Inner Detective
12:00-1:00 p.m. CST

November 4, 2013:
Lessons Learned - A Look at Recent Malpractice Cases
12:00-1:00 p.m. CST

You can view details and register for all of our webinars at attorneyprotective.com/webinar