AFTER THE CLIENT SURVEY: NOW WHAT?

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Attorneys are frequently resistant to the concept of conducting client surveys. Objections range from an unwillingness to have others talk to your clients, a fear of complaints about your billable rate, to a self-assurance that if clients were unhappy, you would have heard about it, plus lots of other objections in between. Law practice management consultants agree that these objections, whether they arise from insecurity, arrogance, or ignorance, are wrong. In fact, well-conducted client surveys generally produce very positive results for the firm.

I recently posted a practice tip on conducting client surveys on the PBA Solo & Small Firm Section listserv. An attorney responded privately with the statement that he conducted a client survey, and was totally amazed to discover how angry clients were who were dissatisfied with the relationship. I suspect he was also amazed, in most cases, as to how many were dissatisfied, and what actually made those clients angry.

In an industry where 80% of your new business flows from existing clients, can you really afford to have that negativity festering “out there”, unknown to you and below your radar screen? Consider that a happy client may produce one to three referrals, but an unhappy client will inform at least five to seven prospects of your perceived failings. Do the math!

If you’ve seen the influx of new cases into your pipeline slowing to a trickle, it is probably time to survey your current and former clients. Personally, I recommend to my law firm clients that they develop mechanisms to provide their clients with constant opportunities to provide valuable and candid feedback. Better to be proactive than reactive.

Ok, let’s assume you’re one of those astute attorneys who have actually surveyed your clients in one form or another, and now you have their feedback. (For information on how to conduct client surveys, I encourage you to contact me on the hot line.) Now what? Well, the simple truth is that the worst thing you can do is nothing. Better not to ask, than ask and then not do anything to correct the sources of client dissatisfaction. So action is called for. How do you do it?

First, sort out the problem areas into broad categories to the greatest extent possible. These categories might include, for example, scheduling issues, customer service failings, billing-related issues, communication issues and so forth.

If your firm is typical, one area will probably include scheduling issues. This area would include complaints like waiting too long to get an appointment, waiting too long in the reception area for the scheduled appointment, being stood up for an appointment, interruptions to appointments, lack of undivided attention during appointments, and so forth. Each of these issues should be addressed in one “overhaul” by taking actions like

§ making sure you schedule travel time to/from appointments and preparation/wrap-up time in addition to what is on the calendar — failure to do so is one of the number one causes of running late for appointments and getting backed up

§ having your secretary remind you during the meeting at preset intervals by telephone speaker of the time that has passed, so you can end the meeting on time by keeping the client (and you) aware of the passage of time

§ terminating other work promptly when the client arrives in order to start the meeting at the time scheduled

§ having the client review a prepared PowerPoint presentation or purchased educational videotape explaining their type of matter, review written materials, and/or receive beverage service when made to wait

§ developing “no interrupt” rules for meetings including not allowing your secretary to bring in other client work for review or signature during a meeting, and not allowing other partners to interrupt meetings in progress

§ using a PDA to track your appointments and remind you when you are out of the office that an appointment is imminent

§ having your secretary leave you an email or vmail the day before with your appointment schedule for the following day

§ refer to your calendar frequently during the day, especially when out of the office, so your secretary can contact clients to move back or reschedule meetings *before* clients travel to your office

Another common area of complaint often concerns client service skills. These might include lack of adequate communications, poor response time to telephone or email queries, constant busy signals when attempting to call the firm, and even a perception of rude or uncaring response from support staff with whom the client interacts in your absence.

If I had a dime for every time I call back an attorney who has left a message on the hot line and reach a receptionist or secretary who leaves me with the distinct impression I am imposing on their day, well, I wouldn’t worry about working for a living by now. Less often, but occasionally, I reach someone who is actually outright rude. They cross examine me in a decidedly “unfriendly” way before they will even consider putting me through. You may have the most wonderful secretary or assistant in the world. But do you *know* how he/she is perceived by the majority of your clients? Do you know how they are actually carrying out and interpreting your instructions? You may be surprised to find out. These types of issues offer a multitude of solutions:

§ Staff should be professionally trained in customer service and marketing skills. They are, after all, the keepers of your first impression. Start with a great videotape from the State Bar of Wisconsin, and follow it up with a good local seminar. Sometimes something as simple as putting a mirror in front of them, which forces them to smile when speaking on the phone, can have a major impact on how friendly they are perceived to be by clients.

§ At the onset of the client relationship, establish realistic expectations for how quickly you will respond to email and vmail.

§ Return all telephone calls and respond to all emails within 24 hours at the absolute latest. Two to four hours is preferable for superior client service. Sometimes this means that the response is an acknowledgement from a staff member that you have received the communication and will provide a complete response shortly. Just don't leave the client "hanging" wondering if they're being ignored.

§ If you don't have an answer for the client, don't avoid returning or taking the call. Just say so, and indicate you are following up. Don't have the stomach for that call? Have your assistant make the call for you.

§ If you don't have vmail, get it. Most clients greatly prefer the ability to leave a detailed message in their own voice, rather than just leaving a "tag you're it" message asking that their call be returned. That doesn't mean purchase of an expensive system. You can probably get perfectly adequate vmail from your telephone service provider. And that gives you the ability to check vmail 24x7 from anywhere, not just by looking at the pink slips on your desk or touching base with your assistant during business hours.

§ Consider whether you have an adequate number of telephone lines to service your clients. Persistent busy signals send potential clients right to your competitor's phone.

§ Copy the client on all significant correspondence. Provide them with a folder up front in which to keep all the copies you send them. Mark your calendar to touch base with the client every six months with a status update, even if it is only to say that the matter is still pending, but you are actively monitoring it.

§ Change your vmail recording when you are out for the entire day, or longer, so that clients do not anticipate receiving a return call in the "usual" timeframe. Again, you want to create realistic expectations.

§ Use an autoresponder (don't forget to except out any listservs you participate in) to do the same for emails if you are unable to review and respond within 24 hours.

These are examples of the types of actions that should follow up a client survey. They are not all-inclusive by any means, but are typical of the results of many initial surveys. After a while of regularly surveying clients and fine tuning your practice, the issues will be more subtle and require more finesse and thought to manage. The point is to sort out the feedback, and take appropriate action.

You may also have noticed that few of these actions require any significant cash outlay on your part. Fine tuning your practice is more about organization, attitude and establishing solid procedures. That's not to say you may not have to spend some dollars here and there for software, a PDA, additional telephone lines, or vmail service. But if the reward is more consistent referrals from existing clients, fewer angry clients, a better reputation in the client community, and a greater flow of new matters into your intake pipeline, whatever dollars you spend will become inconsequential in the scheme of things.

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