

## Design to Survey Clients



BY HEATHER SUTTIE

*Firms, to their own detriment, often fail to gauge client satisfaction. Something as simple as a client survey, though, can reap huge returns for minimal investment*

### MARKET

Law firms have traditionally been reluctant to ask clients what they think of them. For a profession in the business of mitigating risk, this is risky business. If your client is happy, wouldn't you want to know why, so you can do more of the same? And, conversely, if your client is unhappy, wouldn't you want to know about that too, so you can do something about it before he or she crosses the street for a chat with your competitors?

Statistics show that many law firms don't make client feedback a priority. One Legal Marketing Association (LMA) survey, published in December 2009, revealed that only 10 per cent of the Canadian and US law firms that responded consider client feedback their top priority, while 20 per cent rank it as their lowest priority. This is pretty consistent with the study's 2008 findings (9 and 26 per cent). *Canadian Lawyer's* 2009 survey of 60 general counsel, meanwhile, found that 72 per cent had not been asked by their top law firms to participate in a client-satisfaction survey.

That's a shame. It's common sense, after all, that you can win more business from a satisfied client. The large accounting and financial-services firms know this and have been using formal feedback protocols to survey their clients for years. Of course, not everything clients say will come as a surprise. Roughly 70 per cent of feedback is information that you already know and 20 per cent confirms what you had suspected. But the remaining 10 per cent of responses are golden nuggets — and the law firms that do survey clients are using those “golden nugget” opportunities to pitch for work that's currently being done by their competitors.

One firm that has reaped the benefits of client surveys is Ogilvy Renault LLP. Lise Monette, the firm's Chief Marketing Officer, says conducting surveys enhances and solidifies the relationship between a client and a trusted advisor. She says asking for feedback is the best marketing you can do. “Clients love it,” she says. “We show them the love, and that we're listening and doing this on our dime.”

Monette says that while most corporations design business plans based on customer feedback, many law firms don't. “No

one is conducting surveys in a consistent way,” she says. “You can't do business plans without input from clients.”

### What Are You Afraid Of?

“The reason for not doing client surveys is that, when you ask for feedback, you are obligated to respond to the comments and to make the changes and improvements, when reasonable, that clients want,” says Keith Cassidy, who has been an executive at many of the country's largest firms.

Admittedly, it can be a daunting task to be told that you need to change how you do business, but it's usually not an “all or nothing” proposition. Feedback is often more favourable than anticipated and issues are surprisingly simple to remedy. All it took to make one client I surveyed happy, for example, was the addition of an identifying number on the invoice that made it easier for him to tell which firm sent the bill.

Respondents to the online forum Leadership for Lawyers suggested there can also be a degree of arrogance among law firms that feel they do good work and, if clients have concerns, they will pipe up — or that clients may not be able to assess their work independent of the outcome.

At a recent LMA conference, in-house lawyers were not shy about their expectations of outside counsel. They said they wanted to be asked questions that show an eagerness on the part of law firms to understand the business: “What are you seeing that's changing within your customer base?” “Who, in addition to you, are the decision-makers on outside counsel?” These are questions applicable to any client, whether that person is an in-house lawyer or not.

### Satisfaction and Loyalty

There is a difference between satisfaction and loyalty. For example, the feedback provider may not be the only person to decide whether to continue retaining your firm. And even if he or she is satisfied with your services, you may still lose the client should that person leave the company.

One way to gauge loyalty is to ask whether a highly satisfied client would recommend the firm to others. While this may

... continued on page 85

## LAW FIRM MARKETING

... continued from page 82

seem like a delicate proposition, it yields positive results most of the time. As Frederick Reichheld notes in his 2003 paper “The One Number You Need to Grow” in the *Harvard Business Review*, “When customers act as references, they do more than indicate that they’ve received good economic value from a company; they put their own reputations on the line. And they will risk their own reputations only if they feel loyal.”

This is why the most thorough client-feedback methods seek to capture personal recommendations. This is also why, with their approval, client testimonials will appear on their firm’s marketing collateral — a winning strategy that allows the firm to stand out from the competition.

### The Right Approach

Most clients will tell you they are most comfortable being interviewed by a third party, because speaking freely to someone who is a neutral conduit instills confidence in the process. If you do take the internal route, it’s crucial that the person handling the survey is recognized as impartial both by clients being interviewed and by firm members.

Nothing beats an in-person survey, though. Monette conducts personal surveys accompanied by either the firm’s Chair or Managing Partner, which she says helps underscore the importance of that client to the firm. This method also enables an interviewer to read body language and get a good sense of the client’s work environment.

Written surveys create work for your client. One Leadership for Lawyers respondent found the response to these was usually

less than 10 per cent, and the comments were generally positive but vague. He suggested that phone interviews done by a professional would produce better results. He’s right; telephone surveys enable two-way conversation, allowing an interviewer to probe for subtleties conveyed by the client’s tone.

Online surveys are popular only because they’re convenient. This quick (but one-way) communication means that, while you’ll get quantitative measures, you’ll lose the subtleties.

### Keys to Success

Act fast on requests. As Monette says, “You must respond to comments and execute change.” Cassidy agrees, saying “The challenge many firms face is to fully review their business processes and then implement the efficiencies that improve matter management, transparency, and add real value for their clients, thereby strengthening the client relationship.”

And strengthening the relationship is what feedback is all about. Surveyed clients report that firms that ask for input set themselves head and shoulders above the competition. Considering that very few firms are currently asking clients what they think, you have the distinct advantage to seize this opportunity to stand out from the crowd. Do it before it’s too late. ■

---

*Heather Suttie is a legal business development and law marketing consultant. She works with law firms, legal teams and lawyers in all areas of practice and consults to Canada’s leading law firms — national, mid-size and boutique. Heather can be reached at (416) 964-9607 or [heather@heathersuttie.ca](mailto:heather@heathersuttie.ca).*