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Client Surveys: Be An Informed Consumer

By Marci Krufka

At long last, many law firms have embraced the client survey as one of the most effective tools for ensuring client satisfaction and improving firm marketing efforts. Deciding to conduct a client survey is the first step (and may be a challenge in itself). The crucial decision, however, is which of the many available client survey providers to choose.

Not all client survey providers are created equal. There are several critical things to look for when making a selection.

What Are You Really Getting For Your Money?

Many companies offer a complete client survey for a fixed fee. The fixed fee is an attractive option as it allows the Marketing Director or Marketing Partner to adequately plan for the client survey in an annual marketing budget. Some of the bargain fees for client surveys are attractive at first glance, particularly while the economy remains sluggish and marketing budgets are under close scrutiny. Be sure to read the fine print and understand exactly what you can expect for the price quoted.

Most fixed fees include, at a minimum, survey design, distribution and tabulation. Some offer the option to deploy the survey questionnaire on a secure site on the Internet in addition to traditional, written surveys distributed by mail, so that clients can complete the survey online. Some also offer to deliver the results to you in an electronic format compatible with your firm's existing systems.

So you conduct your survey, receive your written report, and then what? How do you interpret all of the data? How much of the information do you share with partners? With all lawyers? With paralegals and staff? How should it be presented? What action do you need to take based on the information received? How do you follow-up?

Make sure your client survey provider offers survey analysis and interpretation by a knowledgeable consultant with experience in conducting client surveys and knowledge and experience in the legal industry.

Without the guidance of an experienced consultant, information provided in response to a client survey can be subject to misinterpretation. For example:

- Seventy percent of your clients say they are completely satisfied with your services. Should you jump for joy or let the anxiety attack commence?
- Seventy-five percent of your clients believe your fees are reasonable. Should you continue your existing hourly rates or consider selected increases?

In the most successful client survey efforts, a knowledgeable consultant will review the client survey results with you in detail (preferably in person) in addition to providing the written report and tabulations. Every firm is different and every client survey report presents unique opportunities and challenges. A consultant should work with you to:

- analyze your survey results based on his or her experience
- identify issues that require immediate attention
- identify opportunities for cross-selling and additional work and make recommendations on how to best capitalize on them
- assist the firm in deciding how to roll out the survey results and to whom
- Make specific recommendations on follow-up efforts the firm should pursue

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Follow-Up From Your Client Service Provider

Follow-up by the firm is the most critical part of the client survey process. For example, imagine the following situation: A client responds to the survey identifying specific areas of dissatisfaction (“Your lawyers do not return my call by the end of the business day; I am not satisfied with your updates on matter status.”), and waives the confidentiality of her response. Weeks, perhaps months, pass, and the behavior of the lawyers in the firm does not change. If the client had not considered firing the firm before, she may after receiving no response to her feedback.

steps (the who, how and when) to respond to opportunities identified by survey respondents.

Understanding The Legal Market

The importance of accurate survey analysis and interpretation is self-evident. It is equally important, however, that those conducting the analysis have knowledge and experience in the legal market. Professional service firms, and law firms in particular, have unique characteristics in their personalities and their cultures. The legal market is also unlike most other markets; it has unique attributes not found in the commercial, retail, manufacturing or other service sectors.

Using Survey Results for Benchmarking

Receiving feedback from your clients is valuable in and of itself, but reviewing your client survey results in a vacuum is far less valuable than benchmarking where your firm stands versus the industry as a whole. Marketing experts understand this, and some client survey providers have begun to offer database comparisons that benchmark your survey results versus the results of other law firms.

Understand The Provider’s Database

A database with fewer than several thousand responses will not provide an adequate basis upon which to compare your firm. It is also critical that the information in the database is current — no more than a few years old. Can you imagine comparing your firm to the legal market five years ago? Ten years ago?

From these comparisons, you can get a true sense as to how you are doing versus your competitors. Also, survey results that are better than industry benchmarks make great marketing tools. For example, “Our firm scored X% better than average for being responsive to our clients’ needs,” or “More of our clients perceive the value of our firm as ‘excellent’ than those in the database rate their firms.”

Database comparisons can provide some of the most relevant information in your client survey report. Make sure that your provider’s data will be useful to your firm.

Considerations When Selecting Your Client Survey Provider

Be an informed consumer. When interviewing potential client survey providers, be sure to ask the following questions:

- Do you have experience in the legal market? What type of experience? How much?

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Additionally, in response to a survey, clients often indicate their need for additional services or services in new practice areas from the firm. Not responding in a timely fashion or, heaven forbid, not responding at all, will not only result in the loss of that opportunity for additional work — you may lose the opportunity for additional work in the future.

A knowledgeable consultant should identify areas of concern raised by clients and advise the firm of these issues promptly upon receipt of the survey response. The consultant should provide recommendations for addressing issues regarding service delivery. He or she should also work with you to develop action

For these reasons, it is critical that your client survey provider and the professionals who interpret your survey results have extensive knowledge of the legal market. If they do not, it is possible that:

- the design of the survey will not be appropriate or optimal for law firm clients
- areas of concern raised by respondents will be missed or misinterpreted
- opportunities for cross-selling or receiving additional work will be misinterpreted or overlooked completely

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- Have you conducted client surveys for law firms before?
- What does your fee include?
- What will I receive in addition to the survey design, distribution and tabulation?
- What will you provide in terms of survey analysis and interpretation?
- Will you provide any recommendations to our firm based upon our survey results?
- Will you recommend follow-up strategies?
- Do you maintain a database so that we can benchmark our results?
- How many client survey responses does your database contain?
- How current are the responses?

Conclusion

A client survey can be one of the most valuable investments your firm can make. By being an informed consumer when selecting a survey provider, you will receive the best return on your investment. ♦

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