

Client Surveys – Here for the Long Haul

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In an increasingly competitive marketplace, lawyers can no longer act in isolation and assume that the delivery of tangible results will be reflected in the growth of their client lists. Law firms must see themselves as businesses; those that are in denial about modern day business practices are bound to fail.

Large- and medium-sized law firms have embraced client surveys as an effective marketing tool for gathering valuable information from clients and the marketplace for almost 25 years. However, they still continue to pay lip service to client relationships but don't incorporate this data into their strategic growth plans for their organizations. Part of the problem lies in the planning stage – if the objective is not clear, surveys can result in a costly, ineffective use of resources and time. Those that tend to be poorly designed lack follow-up. Those that are badly designed have the potential of harming a firm's reputation and leaving the respondent with an impression of indifference. Paying lip service is no longer enough. Don't wait for clients to complain over and over again or take their business to a competitor before implementing changes in your client relationships.

Purpose of Surveys

Although surveys come in all shapes and sizes, and for all budgets, the process of putting together a good survey requires more than just throwing together a few questions that identify areas of concern for the firm. First and foremost, aligning the process with the overall objective is imperative. If this is not clear from the beginning, the foundation of the survey will remain weak.

Determine whether you want to measure client satisfaction in hindsight or conduct forward-looking surveys that incorporate the final results into growth strategies of the firm. Agreement in advance on key elements of the survey's purpose will determine its value and the firm's satisfaction. For example, if the primary focus of the survey is client relationships, the questions will focus on identifying procedures that clients would be like to have conducted in a different manner, interaction between members of the firm and clients, and/or requiring additional services for other business opportunities.

Other main objectives for conducting a survey may be keeping a major client happy, concentrating on the largest clients in order to generate additional information on potential markets, finding new clients, cross-selling or creating goodwill. Conversely, another reason may be to create news value for the law firm by conducting a survey that focuses, for example, on the implications of Sarbanes Oxley for public companies. Whatever the primary focus of the survey, without client participation it will fail. The questions and follow-up need to be crafted to capture specific information that in turn will help the firm achieve its growth targets.

Client Participation

Clients are not likely to invest the time and resources needed to make the survey a success if they doubt the sincerity and intention of the survey or are not clear about its benefits to them. A key method to convey the firm's commitment is to issue a request to clients to participate in the

survey. This may be sending the chief marketing officer to lunch with strategic clients or it may be in the form of a letter that should contain:

- How and by whom the survey will be conducted
- The procedure for follow-up interviews
- Who will conduct the analysis of the results
- The firm's commitment to act on any client relationship problems found in the results

For successful surveys, it is crucial to ensure that the client is comfortable giving honest feedback, whether on paper, by telephone, or in a face-to-face interview. Typically, written surveys garner greater feedback. Depending on the subject matter, personal interviews and focus groups, though time-consuming and expensive, should be limited to exclusive clients that are strategic to the firm. Face-to-face interviews are essential to grasp an in-depth look at concerns and issues. Whatever the reason for conducting the client survey, all should give respondents the opportunity to address their concerns and describe what sort of changes should be instituted.

Internal vs. Strategic Communications Companies

Whether the survey is formulated internally or by a marketing company, make certain the survey questionnaire is easy to complete. Reiterating the benefits to the client in the survey will subtly remind them that the law firm has their best interests at heart. Retaining a marketing firm to conduct the survey can prevent unnecessary friction between lawyers and clients. Another advantage of retaining an outside marketing firm is that not only will it ensure an honest response from the client, but it will provide lawyers with the comfort that unfair or harsh criticism of the firm will not circulate within the company.

Fees for outside firms vary from \$7,000 to \$100,000-plus, depending on the follow-up activities such as a public relations campaign after the survey. The majority of fees include the survey's question design, distribution and analysis of the results. Don't change market companies in the middle of the campaign and do pretest all questionnaires for logic, flow and wording.

Follow-up

An obvious area that firms miss out on is communicating to their clients the results of their survey as well as the measures that will be implemented as a result of client concerns expressed in the survey. Even if all the desired measures cannot be realistically instituted, it is important that clients are kept informed of the results and progress. Otherwise, from the client's perspective, they will feel that the law firm does not value their input. If the results are covered in the press, please keep your clients abreast of this news, particularly your large clients. Bottom line, those in doubt that marketing the law firm is not here for the long haul should look at their counterparts across the pond and observe that major firms are devoting considerably more of their resources – both financial and human – to marketing practices.