Client Service Interviews

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The regular surveys of client satisfaction are out again. It's nearing the end of the first quarter, and the reports focused on how clients feel about their lawyers are reporting nothing we didn't already know—clients don't understand why attorneys are non-responsive. After all these years of the same results, why hasn't it changed?

I suspect it has. If a tree falls in the forest and no one hears it… you know the rest! If we only measure through survey instruments that are third party anonymous responses, how do we *really* know that our clients aren't receiving the value-add benefit of great service? That's the benefit of providing your own survey – your own interview to evaluate your clients' satisfaction levels.

This opens Pandora's Box. "My clients will not participate unless I do the interview." "Our clients don't have time for a survey." "Our clients would tell us if something was amiss." Heard these before? Usually followed by a confusing change of counsel in a client that has been a valuable part of the firm for some time. After the client is gone is not the time to focus on your service.

There are several pieces in this puzzle and putting a little effort into each one will build a landscape that helps you know exactly where your firm's service levels are highest, and lowest.

Who Should Interview

Often this is done by a committee or panel pre-established, well-practiced, and irrespective of the relationship attorney. The number of people depends on the size of the client. If you have one in-house counsel, sending one firm representative is great. If you have a counsel team, consider sending two or three professionals. While some of these may be attorneys, you may also have General Counsel or Senior Marketing professionals that could be great in this role.

Who Is Interviewed

Look at your list of clients. There is a clear line between the top clients and the mid-level group. You want to address the top clients – whether that is a top 10, or a top 15. You might rotate so you interview 5 of the top 15 every year. That means every three years we touch our top clients.

Customize the Process

Have a script of basic questions for every client. That will gather the data and create some measurable norms for the firm. Also have questions that pertain specifically to this client, that will help determine how you serve their pain points. Include questions that help you understand their business needs and longer-term vision, without addressing how you can solve something. Have one or two questions that are more thought-provoking – "what if we established a way to IM (Slack) each other through our computers (instead of cell phones)?" – than immediately answerable.

Conducting the Interview

You'll provide the basic questions in advance, give them time to prepare thoughtful discussion points. Meet at their office, expect an hour to ninety minutes of dialogue, and listen more than you talk. Remove your

technology from the conversation – and that includes buzzing, humming, or dinging. Remember this is an important client, or you wouldn't be investing the time and attention to hear from them.

Follow-Up

Remember that anytime you ask for feedback it is important to demonstrate it was received. If you have basic questions that create benchmarks, you can provide a summary report to all clients of the results. Taking that deeper to report back to each client how you have addressed their feedback with innovative ideas and collaborative efforts. Let them know you'll be checking to see how your approach has provided higher value, and what other feedback they have to offer.

Don't Do It

You might be tempted to defend some point raised by the client. You might be anxious to provide solutions as you listen to the business needs your client has. You might feel strongly that your firm can handle new legal work that the client has and want to tell them so. Don't do it. This meeting is about the client, receiving feedback from them, listening more than talking. This takes practice, which is why a committee that is established will get better over time.

If you are reluctant to talk with your clients about the level of service they receive from your firm, some other firm is going to talk about how great the service is that they provide. The information you receive will offer you opportunities to improve, and if done well, with also cement the client relationship, and could lead to even more opportunities to serve!

For more information and further reading on Culture, visit our online library.

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Judy understands leadership and teams. And, she knows how to help you maximize the potential of yours. For over two decades, Judy has applied her vast knowledge of team dynamics, emotional intelligence, work/life balance, leadership, and finance to help organizations improve their people, process, performance and, ultimately, profits.

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