

## What Does Your Client Really Think?

By Barb Cotton

I know that we all try hard to please our clients and meet a high standard of service. But how do we know if we are hitting or missing the mark?

Ask your clients-most of them will be happy to tell you what they really think.

Your "survey" of your clients can be done in a number of ways, ranging from casual to formal.

Perhaps the most casual method is to simply call your clients after every engagement and ask if they were satisfied with the work done and the service received. If you implement a system of always calling after every engagement your clients will perceive that you care that their needs are met and that you are eager to make things right, should that be necessary. You will reap the benefit of staying close to your clients and will likely gain much valuable information as to how you can improve.

Another more formal method is to have a small survey card printed and insert the card with every outgoing invoice. The simplest, but seemingly effective, questions that I have heard of being asked on such cards are:

What did you like about what we did?

What did you not like?

What would you like us to do differently?

Some firms choose to implement formal written surveys which are conducted on an annual basis, for example. The types of questions asked are more detailed and, as suggested by the Canadian Bar Association in the Client Care Handbook "7 Keys to Great Client Service"([www.cba.org/CBA/LCI/Main/handbooks.asp](http://www.cba.org/CBA/LCI/Main/handbooks.asp)), can include:

Did your lawyer understand what you wanted?

Did your lawyer work hard for you?

Did your lawyer keep you informed as to the progress of your file?

Did your lawyer respond to your telephone calls and/or emails promptly?

Did your lawyer treat you with respect?

Did you understand the information your lawyer gave you?

Did you receive courteous and appropriate service from support staff?

Did you feel comfortable asking your lawyer to repeat something again?

Did you feel your lawyer was looking out for your best interests?

Here's a somewhat different take on questions to ask suggested by Henry W. Ewalt in *Through the Client's Eyes, New Approaches to Get Clients to Hire You Again and Again* (U.S.A., American Bar Association, Law Practice Management Section, 2002):

Did your lawyer:

- ask what goals you wanted to achieve?
- tell you how he or she was going to try to achieve your goals?
- obtain your input and approval on the course of action?
- tell you how long the process would take?
- tell you how fees were to be charged?
- estimate your total bill?
- explain that you would be making the decisions about your case?
- use your name when talking with you?
- keep you informed of developments?
- promptly respond to your requests?
- promptly return your calls/reply to your emails?

Another sound practice is to have year end interviews with your key clients in order to review matters in detail. Take this as an opportunity to visit their offices, sites or homes, off the clock. In addition to letting you gain valuable insights into your client's satisfaction level and the health of the relationship, such visits will allow you to tune into the ongoing but perhaps subtle rhythms of your client's place of business and meet any new staff that have come on board since your last visit.

There seems to be a bit of a debate as to whether this one-on-one surveying should be done by the lawyer or by support staff such as a marketing assistant or paralegal. The view that someone else should do it is premised on the belief that the client will be more candid with a third party. I don't believe it, as, in my experience, clients are more than happy to tell you how it is. I also think that the lawyer should be the one to go in order to spend valuable personal time

with the client in a relaxed atmosphere in which the focus is on the client's needs and wants.

Whatever method you choose to survey your clients, follow-up is key. Your clients will have contributed time and trouble in participating in your survey, whether casual or formal, and they will want to know that you have heard them and will act on their concerns.

An effective way of letting your clients know they have been heard is to send a follow-up letter thanking them for taking the time to meet with you or respond to your written survey, summarizing their comments, itemizing the changes that they have told you they would like you to make and telling them what you are going to do to address their concerns.

**Barb Cotton is the principal of Bottom Line Research & Communications, which helps solo and small firm practitioners throughout Alberta on a contract basis with their legal research needs, including the preparation of research memoranda, briefs and factums, including e-factums, or just a quick search and reporting letter with cases. Barb can be reached at (403) 240-3142, cell (403) 852-3462, fax (403) 242-5756 and at [barb@bottomlineresearch.ca](mailto:barb@bottomlineresearch.ca), or check out her web site at [www.bottomlineresearch.ca](http://www.bottomlineresearch.ca).**