

Get a Big Payoff from Client Satisfaction Surveys

It's a good idea to survey your clients on how you can improve your practice — if you are willing to listen and change, accordingly.

At a good-sized midwestern firm, a recent client survey response came in with a very negative comments that caught the managing partner by surprise. He agreed in advance to contact all firm clients who showed dissatisfaction, even clients he served. Though it wasn't an easy he called them and was able to salvage the relationship.

The partner reflected, "We were definitely about to lose them and had no idea they were unhappy. We only have their business today due to the survey."

It's a true story shared by Michelle Golden, President of Golden Practices Inc., and it's real-world evidence of the value of her No. 1 rule when it comes to client surveys: "Make sure you are 100 percent committed to responding to the survey results."

That includes personally calling any clients who identify themselves and express less than perfect satisfaction — and making operational or even staffing changes based on what you learn from the survey. Golden shares these other keys to getting a high payoff on your survey.

- **Track responses by partner, practice area, industry or office.** Use subtle alphanumeric coding for mail batches. "It's time consuming but the ability to slice and dice can help you zero in on problem areas," Golden says, "and you appropriately preserve client anonymity."
- **Look for small trends in the data.** "Expect that any firm's survey responses will average in the 4 range on a scale of 1.0 to 5.0," Golden says. "Don't be falsely reassured by these 'good' scores. Instead, look for topics, practice areas, partners, or offices who pull down the average."
- **Establish benchmarks.** If "proactive advice" scored a 4.1 versus "timely delivery" at 4.8, create plans to encourage proactive advice, so that when you resurvey two years later, your numbers improve. "If you want to move the needle, you have to change perceptions," she says.
- **Use printed surveys, not online ones.** Printed and mailed surveys, especially those that look like they will be easy to fill out, dramatically outperform online surveys — easily three times the response rate, Golden says. "For best results, limit the survey to 10 or 15 scoring questions, and three or four open-ended questions. Make it clear that it only takes a few minutes to fill out. And include a postage paid return envelope. They stuff and send right then and there."
- **Consider listing team members.** Let clients rate each member of their team based on "an excellent fit," a "good fit," "jury's still out," or "let's talk." Golden says sharing positive

written comments and high scores with team members really builds morale. "Of course, you must address 'let's talk' responses," she says.

- **Send thank-you letters to clients and share the results with clients.** "Tell them. 'here's what you said we do well, and here are areas you said we should work on'," Golden says. "It shows you listened and didn't waste their time."

- **Never, ever cross-sell in a client survey.** Golden warns that including questions like "which of our other services would you be interested in?" sends an unintended message: the survey is just thinly-veiled market research and not sincere interest in performance opinions.