

CLIENT SURVEYS

Do you know what clients think of your firm? Are you so preoccupied with your ever-present next hearing or meeting that you fail to take the time and find out? Or maybe you would rather not know as long as the clients pay their bills and keep the money wheel turning. Knowing how your clients perceive your law practice is essential information that can enhance the quality of your legal service and limit your firm's exposure to malpractice liability.

Reasons for Conducting Client Surveys

Conducting regular client surveys is an effective way of obtaining this valuable legal intelligence. Learning your clients' opinions regarding the performance of your firm serves several objectives:

Getting out of your bubble. If you are too consumed by the minutiae of work, your perception of the quality of your services may be vastly different from the client's. A client survey lets you see the view from another angle.

Understanding client needs and concerns. Likewise, a client may identify specific issues or worries in a survey that she cannot communicate openly. Some clients may prefer to offer criticism indirectly in the context of a questionnaire, rather than telling their attorney face-to-face.

Enhancing client engagement. Requesting feedback demonstrates a firm's commitment to listening, establishes a connection and level of trust, and increases the probability that the client retains the firm for the duration of the matter. A client asked to provide opinions will feel valued and more like a part of her own legal team, leading to repeat business and referrals.

Managing the client. If feedback obtained after the initial consultation reveals that the client requires daily updates or other unrealistic expectations, the firm can calibrate expectations as necessary. Surveys also help you recognize a discontented client and prevent the relationship from deteriorating. Alternatively, you may need to cut ties with an excessively difficult client – learning as soon as possible helps you withdraw in a timely manner.

Providing opportunity to vent. If a client is frustrated, a survey offers an avenue for the client to let off steam before the frustrations boil over and become more explosive or damaging.

Recognizing merit or remedying staff issues. Survey responses may highlight deserving persons for praise, recognition, or reward: an associate, an assistant, maybe the

cleaning service, or even a partner. Similarly, a survey may identify areas of concern regarding staff otherwise concealed from management (such as a rude receptionist).

Limiting malpractice and disciplinary exposure. Soliciting client feedback can also limit malpractice liability in two ways. First, by identifying problems facing your practice sooner, empowering your firm to take timely action to mitigate or cure existing issues and avoid them in the future. Secondly, if the client did not respond to your survey with specific concerns, this silence could cast doubt if the client later raises them for the first time in a malpractice claim or grievance proceeding.

Improving overall quality of legal service. Most importantly, learn what your firm can be doing better. Client feedback helps you identify aspects of your practice for improvement or resources that need bolstering.

Tips for Preparing and Conducting Client Surveys

Customize. For example:

- Print out the survey with the name of the client to make the client feel special.
- Tailor the questionnaire language to the specific type of legal matter (family, estate planning, etc.), and use the tailored questionnaires for the appropriate matter.
- Use specific questions for particular areas of interest or malpractice avoidance, for example:
 - *Did you review the attorney's blog on our firm's website?*
 - *Our firm's handling of escrow funds (rate 1 to 5)*

Paper v. Online.

- Paper is fine and may heighten the sense of formality of the feedback process.
- However, it may be more convenient for a client to reflect feedback using an online survey tool such as SurveyMonkey or SurveyGizmo.

Keep it concise.

- Make the survey easy for the client to complete, preferably taking less than five minutes. Lawyers are meticulous by nature and while it may be tempting to craft precise survey questions, these subtleties may be lost on the client.
- A questionnaire that is too long or requires too much thought is a chore and may add a layer of unpleasantness to counsel interaction. A hastily completed survey also attenuates the value of the feedback.

Determine the best approach.

- If the client has a single matter (such as a family case), consider conducting a survey three times over the course of representation:
 - after the initial consultation,

- during the pendency of the matter, and
 - upon conclusion.
- If representing the client on an ongoing basis (such as corporate counsel), consider soliciting client input on an annual basis.

Document the process.

- Record the dates of transmittal and client's receipt.
- Create a tickler to note in the client's file if not returned (to establish that the client neglected to inform you of possible concerns).
- Note the date of return.

Follow up.

- If a problem requires attention – whether to remedy a legitimate issue or to correct a client's misperception – confer with the appropriate members of your staff and formulate an action plan to deal with the problem with the appropriate level of urgency.

Employ consistently.

- Make it a routine practice for most or all legal matters and clients. Systematically obtaining client feedback also helps the firm compile aggregate data for deeper analysis.
- Client surveys can be a crucial component in tracking your firm's key performance indicators (KPIs) and progress toward achieving its goals (see Debra L. Bruce, *Keys to Success: How Monitoring Certain Performance Indicators Can Help Firms Achieve Goals*, 80 Tex. B.J. 320 (May 2017).)

Review periodically.

- Set a date every year to look at the surveys (and other items such as fee agreements, the framework for measuring KPIs) to reevaluate their content and how your office employs them.

Don't take it personally.

- Put on your analytical hat and view any criticism gleaned from surveys as an opportunity to improve.
- Even if a client attacks you in bad faith, try to view the issue from the client's perspective, then look for ways to de-escalate the problem or improve the relationship.

Sample client surveys. For examples to review and adapt for your own practice, see:

- [After initial consultation.](#)
- [Interim survey.](#)
- [After conclusion of legal matter.](#)