

WHY CLIENT FEEDBACK INTERVIEWS?

Because you really do need to know

The client's perspective on your relationship is the best foundation for your business development plan.

by Martha E. Candiello, Esq.



Given today's keen competition among law firms, coupled with the genuine desire of firms to provide distinguished service stemming from a platinum client service culture, a professionally designed and executed client interview program is no longer a 'luxury' limited to 'top firms'. As more firms institute such programs and evolve existing programs to capture even more of their clients' attention, a firm without a first-rate program is disadvantaged because it is not effectively capitalizing on its client relationships and investment. Once you've seen the results of a client interview program, you'll wonder why you didn't start one sooner.

There are many reasons for conducting an interview program, all of which can help you safeguard clients and grow your business with them. Conducting an in-depth interview is far more than a check on client satisfaction. Without doubt, your clients will be delighted to be asked; these programs create tremendous loyalty and goodwill. Also, the business opportunities identified through a professionally conceived and executed interview program will almost always far exceed any problems uncovered. For David Antzis, the managing partner of Saul Ewing, client interviews, "demonstrate that we care about our clients and in turn we've learned about potential business opportunities; we can directly trace new business to the process."

What could be better than having your interview findings, *as articulated by the client*, become the foundation of your business development plan for that client? If problems are uncovered, you'll find yourself in the enviable position of having the opportunity to address them before the client simply goes elsewhere. Without the intervention of a professional interview, many clients might just move to another firm, as demonstrated by the significant number of clients (nearly 50 %) who say they've switched primary law firms in the last year.

No matter how secure you believe your client relationships to be, you know your competition is wooing your clients. Alvidas Jasin of Thompson Hine, whose firm has a comprehensive client interview program, attests to this, "If you're not conducting client interviews, you're putting your most important client relationships at risk. You should just assume that your competition is talking to your clients; many are hiring premier consulting firms to conduct client surveys on their behalf. If by comparison, your firm isn't engaging with clients on the same in-depth

level, your clients may well think they aren't that important to you. Who's paying better attention to your clients -- you or your competition?"

Keys to an Effective Client Interview Program

Develop support. Client interview programs are best undertaken if they have the support of firm management, who can set the tone and model expectations. But what if top management is not quite sold on setting up a full-blown program? You can nonetheless experience excellent success and develop program support by perhaps starting with a professionally designed pilot program. Such a program could include testing the idea with some partners and identifying those who support the idea and are keen to put their clients first on the list.

Share success stories. After you've conducted interviews, share success stories within the firm. Did you get an unexpected opportunity to pitch for new business? A lead to a new client? A chance to mend fences? Perhaps you learned about some client goals that your firm is uniquely suited to help with. Or maybe you heard similar feedback from several clients and learned something about the firm's culture or systems. It's possible you'll learn something about your competition for the client's business. Client feedback is normally enormously instructive; sharing learnings can improve service generally as well as lend support to the interview program.

Address common misconceptions. Notwithstanding the rich benefits of a client interview program, some individuals may still harbor misconceptions. These range from being overprotective of the client relationship ("My client is too busy.") to a false sense of security ("I know my clients and I know they are happy. And if they weren't, they'd tell me."). Other lawyers fear "interference" - sharing some of the credit for fees generated with another lawyer, or otherwise losing "control" over the client relationship.

All of these misconceptions run counter to the experience of those savvy firms which have conducted client feedback interviews, sometimes over many years. Clients, given enough lead time and asked properly, are willing, if not eager, to participate. For the most part, they will be flattered that you cared enough about the relationship to ask. Also, even though client loyalty may be a thing of the past, a client might actually prefer **not** to switch law firms and suffer the attendant transition issues if fences can be mended with the current firm. The misapprehensions based in "interference with the relationship" go to the question whether the client is a client of the firm or of a specific attorney in the firm. From a risk management standpoint and from the perspective of firm growth and stability, firms are increasingly taking the position that institutionalizing the client-firm relationship best supports the short and long term health of the organization. Client interviews provide an excellent means to support the institutionalization of a firm's clients.

Ask the right questions, in the right way. A well-planned and executed interview goes well beyond Mayor Koch's "How are we doin'?" approach, delivering a depth of client understanding that inevitably enhances the relationship. This end requires thoughtful questions and someone extremely skilled in listening and asking probing follow on questions. As you prepare questions to ask your clients, keep the following principles in mind: strive for some consistency in the questions you ask so as to be able to compare across clients; do your homework in respect of particular client relationships and add specific questions for those clients; last, ask open-ended questions and *wait* for a response. Don't fill the silence. Seems easy, but it takes training, skill and practice.

Send the right person to conduct the interview. Having the necessary interviewing skills is only the first criterion in choosing who to send to see the client. One author on the subject wrote , "Candor is enhanced by the level of independence of the interviewer." Candid and complete client responses are at the heart of the value of a client interview program. Choosing the right person to conduct the interviews is therefore critical. Many clients are uncomfortable directly giving feedback (good or bad) to the person they deal with on a regular basis. For this reason, the relationship partner is rarely the right person to send on an interview. (This is analogous to a situation we have all experienced - the waiter asks how you liked dinner; how many times have you said 'it was fine', even if it didn't measure up? And how many times have you then told all your friends not to frequent the restaurant?). Having the managing partner conduct interviews is another choice, although clients may have similar reservations about direct feedback to the managing partner. Also, conducting an effective number of interviews is time-intensive and may not be the best use of a managing partner's time. The decision whether to utilize individuals from the marketing department or an outside independent professional may come down to resources - are there enough trained individuals in the marketing group to conduct the appropriate number of interviews, especially as more marketing departments are being asked to do more with less? Can an independent professional be most cost-efficient? In many cases, yes.

Don't offer solutions or market the firm. It is tempting to respond immediately to a client's expressed concern or legal need. It's usually best, however, not to. Instead, take note and promise a prompt response. You get two significant benefits from this approach. First, chances are you'll offer a better solution if you have a chance to think about it and perhaps confer with others. Second, one of the biggest incentives for a client to participate in an interview is the explicit promise that it won't be a marketing exercise. Keep that promise. It is my practice to ask the client if someone from the firm can follow up. This approach enhances your credibility and perhaps also the quality of the follow up.

Conclusion. Don't place yourself and your firm at a competitive disadvantage. In this economy there is no downside to starting or enhancing a client interview program.

Martha E. Candiello (mcandiello@clientbridge.net) is a lawyer and principal of ClientBridge, LLC, specializing in helping law firms create business opportunities and sustainable client relationships by obtaining insights on the needs and expectations of law firm clients through client feedback interviews. Candiello has interviewed law firm clients in many industries in the US and globally.