How to conduct a client satisfaction interview

What is a client satisfaction interview?
A client satisfaction interview is a formal structured meeting to review satisfaction with past work, and explore opportunities to increase satisfaction in the future. The client is told that the purpose of the meeting is to improve service, and that the law firm will pay for the meeting time and all associated work. Typically, the meeting is 45 to 60 minutes in length. Ideally, it is a face to face meeting held at the client’s office.

Five reasons to conduct client satisfaction interviews
Here are five reasons to conduct client satisfaction interviews:
1) The simple act of taking the time to review satisfaction shows clients that you care, and strengthens your relationships.
2) Formal reviews of satisfaction will identify clients who are at risk of switching to another firm.
3) You may get new business directly from the review.
4) You will definitely get some ideas for improving your service.
5) You want to do this before your competitors. Law firms that do other legal work for your clients are increasingly likely to hold client satisfaction interviews, and try to take away business from your firm. You should get there first.

Which clients?
Make a list of the “crown jewel” clients that your law firm could not live without. Plan to interview them all.

In time, you should interview every single client that is profitable and has potential for additional work. If you need to prioritize which to do first, consider these criteria:
- Longstanding relationships
- Top ten in revenues
- Opportunities for increased revenues
- Concerns about decreased revenues
- Perceived problems or threats
- Change in client management/personnel
- New clients
- Cross selling opportunities
- Introduction of a new “relationship” attorney
- Hunches or tips

Do not start with your most important client. Practice on a few other clients first, until you feel confident in your approach.
Who should interview?
The interviewer’s personal characteristics and skills are more important than whether you use lawyers from the firm or outside consultants. A successful interviewer will be able to build rapport, will know what questions to ask, and will be able to direct the discussion to maximize results.

Lawyer interviews
Some experts believe client satisfaction interviews should be conducted by the firm’s lawyers, because:
- Lawyers have the best understanding of the client’s situation
- The interviews will strengthen personal relationships
- Lawyers can promise necessary follow-up action on the spot
- It is less expensive than hiring outsiders

If you do decide to have lawyers conduct the interviews, the next question is who? The partner who manages the relationship certainly has the best understanding of the client, and may want to do it herself. But having one of the senior partners conduct the review will lead to a franker assessment, and is a great way of demonstrating that the entire firm is committed to client satisfaction.

One of the biggest problems with having lawyers conduct the interviews is simply getting them to do it. Some may have trouble fitting this unbillable task into their overcrowded schedules. One way to facilitate the process is to conduct a low key competition between groups or individuals (e.g. whoever completes 100% of their interviews first wins a dinner).

Consultant interviews
Some experts say it’s best to hire an outside consultant to interview clients, because clients will be more candid with an outsider, and trained professionals will conduct better interviews. Hiring outsiders also makes it easier to meet deadlines and assure that all interviews are completed by a certain date.

Consultant Tom Kane suggests a hybrid approach that starts with a third party professional because clients are likely to be more open. This should be followed promptly with a visit from senior management to discuss the results and how to improve the relationship.

Basic questions
Survey questions should be defined in advance. Skilled interviewers may improvise based on their script, but it is still important to start from a script. Some experts even recommend sending the questions in advance, so that clients know exactly what to expect, and can choose to prepare their answers. All interviews should include questions like these to cover basic concepts:
1. What do you like about working with our firm?
2. What could we do better?
3. How would you rate your overall satisfaction?
4. What could we do to increase our rating?
5. In the past, what are some of the things that you’ve liked most about working with law firms, both our firm and others?
6. What have you liked least about working with law firms?
7. Do you see any future trends in your business or industry that will affect the need for legal services?
8. What could we do to make you happy?
9. Would you recommend our firm to others? Why or why not?

**Customized questions**
You may also add customized questions about how clients perceive key issues of your practice, including:
10. The quality of the legal product
11. Listening to client concerns.
12. Understanding client goals.
13. Understanding the client’s industry.
15. Explaining legal issues in terms that clients understand.
16. Showing genuine interest and concern.
17. Being prompt, responsive, and accessible on short notice.
18. Providing accurate and complete billing statements.
19. Charging fair and reasonable fees.

**Thought provoking questions**
Consultant Gerry Riskin also suggests thought provoking questions, such as:
20. Please describe the top three ways you measure our performance.
21. How important to you is it that we know your industry? How do you measure that?
22. When you’re stuck in traffic and you’re thinking about the business, what issues are running through your mind?
23. What could we be doing that would make your life easier?
24. What could we be doing that clients like you may not yet have asked for?
25. How could we better use technology to be of service to you?
26. Are there any services that you think we are missing out on by not making them available to companies like yours?
27. If you were appointed the Managing Partner for a firm like ours, what would you do differently?

**How to interview**
With top clients, you may want to role play the interview in advance with others on your team, just to be sure you’ll make a great impression.

When you start the interview, make sure that the client knows that
your aim is to improve communication and service, and that you are not billing for the time. That in itself will make people smile.

During the meeting, the idea is to keep people talking, and encourage them to speak freely. Simple conversational probes may be quite effective, such as:
- Tell me more…
- Can you give me an example…
- How does this affect you…
- How do you handle ____…

Interviewers should listen and take notes, and never argue or defend themselves. If that’s needed, it should come later.

**Should you sell in these interviews?**

When you interview clients who are very satisfied, is it OK to ask for referrals or even proceed to directly selling new services? The experts disagree on this, sometimes loudly. At one extreme, some structure client satisfaction interviews to include cross-selling. At the other extreme, some believe that the risk is too great, and that even if a client brings up the idea, this meeting should focus exclusively on satisfaction, with selling reserved for other meetings.

You will have to make your own judgment on this. But if there is any doubt at all, or a chance that the client will be offended and this will detract from the interview, play it safe and stick to the satisfaction script.

**How to follow up**

When the client satisfaction interview has been completed, the work of creating super-satisfied clients has just begun.

After the meeting, email the client a list of action items which you can and will achieve, and inform the client as you accomplish each one. The email should include a thank you, and a handwritten thank you note adds even more.

**When should you begin?**

The most important thing is to get started, and to establish a regular schedule of client satisfaction reviews. Although there are controversies over some of the details, every expert agrees that the most important thing is just to get out there and talk to your clients about what they like, and what they need. If you don’t, your competitors will.