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Do You Know How Your Clients *Really* Feel About You?

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Have you ever lost a good client without knowing why?

You're not alone. Studies show that at least **90%** of professional service client relationships that end do so without a single word of dissatisfaction. The client simply takes their business elsewhere. And the trend is increasing in some areas—in one recent year, large law firms were shown to be losing up to 30% of their clients. This is bad news. To make matters worse, it costs up to **5 times** as much to gain a new client as to retain one you've already enlisted.

You can learn to recognize issues before they arise.

Understanding what's working—and not working—in a client relationship is critical. In some client relationships, this degree of sensitivity may be as important—or even more important—than the service you're providing. Even where it isn't, you'll be able to provide better service and more effectively manage your time if you know what your client really wants and are freed up to focus on it.

Many professionals continue to struggle with this.

There are numerous reasons why professionals don't initiate relationship discussions with clients. The five most common are:

- **Unwillingness to recognize that there could be a problem.**
  Professionals are in the business of helping people solve problems, so it's often frightening or unpleasant to acknowledge that we could somehow be part of one. (We can.)
- **An expectation that clients will raise any dissatisfaction they have.**
  Professionals work hard to build trust with clients, so our perspective is that they will feel comfortable bringing grievances to us. (They don't.)
- **A sense of awkwardness.**
  We always want to think there will be an easy and natural opening for soliciting feedback, or that the subject will somehow just come up. (It doesn't.)
- **Pressure to maximize billable hours.**
  Many professional service providers work by the hour and are forced to operate as if the most critical thing is squeezing the most billability out of every day. (It isn't.)
- **Desire to concentrate on the work at hand.**
  Most of us really love our work and we feel that we have nothing of greater value to offer clients. (We do.)

Another important reason, often unstated, is lack of a system for gathering and using the feedback. This typically begins with uncertainty as to who should initiate the survey on the firm side, and is also often related to—and magnifies—any or all of the above reasons. It can be an individual choice, or lack of strategy by an entire firm. The effects are the same: lost opportunities and increased costs.

Getting client feedback is simple once you have a system.

Creating a system for getting client feedback can be surprisingly easy. It should have two components—a formal one (either written or verbal) and a casual one (verbal). The best way to get really valuable client feedback is to hire a qualified third party to interview your clients. A well-constructed interview, conducted by a trained, disinterested professional can unearth information that simply won't show up in any kind of written survey. This includes negatives that people seldom feel comfortable putting in writing and perceptions that might not be clear enough in the client's mind to make it to paper, but nonetheless inform their overall view of your business relationship. An additional benefit of the interview process is that it allows greater flexibility to define—and focus on— the client's priorities. Of course, it also relieves you of much of the burden of creating a system, but it does cost something.

A number of firms that manage client feedback systems internally already use some form of written questionnaire at the conclusion of a matter or as part of a periodic client touch program. If you're not doing this baseline minimum, you're missing out on a valuable chance to learn something about your strengths as well as your weaknesses. And you're leaving your firm open to the potential for needless loss.

One problem with written surveys is figuring out what to ask—and how to ask it. Many firms use client satisfaction surveys that run several pages and cover every conceivable area. They often ask a number of interesting questions—and have the potential for being really powerful information-gathering tools. But I wonder what level of response these firms get and whether it's timely. We're all inundated with information—and requests for information—all the time. Often when I get a long survey, I'm exhausted by the very thought of completing it, and it tends to sit around for a bit. I recommend that my clients who want to use written surveys and manage the process internally streamline both the instrument and the process. Here's how:

- Don't wait until the end of the year to ask how you're doing (it may be too late to alter negative feelings anyhow). Consider doing quarterly surveys and focus them tightly on a specific theme. Try to select themes related to what you think your clients might expect from the relationship—such as service or value—and be prepared to discover that you're wrong about their interests and priorities.
- Be very disciplined about what you ask. People like being asked for their opinions, but they don't like being interrogated. Home in on the top 5-10 questions related to the quarter's theme.
- Don't try to get the questionnaire to do all the work. If there's a problem, you'll need to have a follow-up conversation anyhow. Pose the questions for quick, top-of-mind response. I like to use a format in which respondents are asked to agree or disagree with a series of affirmative statements. You can also add a couple of questions that can be answered in five words or less.
- Avoid asking clients to "imagine" too much. Instead of a "comments" section (which will often come back blank), include something open-ended but more specific. I particularly like "What didn't we ask that you thought we should have?" This also allows you to begin uncovering the client's agenda in the relationship without putting them on the defensive.
- Don't rely on old-fashioned paper distribution means, if you can help it. It's too easy for these things to get stuck in a pile somewhere. Internet-based surveys can be developed quickly and at a reasonable cost, and they're easy for clients to fill in and be done with (after you email them the link). Another plus is that they can be designed to tabulate answers as they're entered, saving time and several steps.
- If you're not comfortable with electronic surveys, consider putting yours on an oversized self-mailing fold-over note—it'll stand out in a crowded in-box and provide ease of return while protecting confidentiality.

(If this sounds like a good starting point for your firm—or if you think it might help you move beyond your current position in your feedback program—I'd be glad to share a sample of what I mean with you. Just email info@evokestrategies.com and be sure to put "sample feedback plan" in the subject line.)

Casual, on-the-spot feedback is another critical element of any client satisfaction program. You have to get into the habit of doing this, but it can go a long way towards keeping the client happy and the relationship on track. I usually conclude meetings by asking one of the following:

- Is what happened today what you were expecting?
- Is there anything you hoped we'd do/discuss today that we didn't?
- What could have made this an even better experience for you?

Most of the time what I've done is to reinforce in the client's mind that they've just had a positive experience working with me. That impression is not hard to create, and once it's been created it tends to grow —and keeps the relationship growing along with it. But if there is any hint of unease or dissatisfaction, I can spot it early and work with the client to fine-tune the relationship to meet their evolving needs.

What's in it for your clients?

Most of this article has discussed what's in it for you in terms of identifying problems before they take root and keeping clients from jumping ship, as well as strategies for structuring your feedback system. But we've virtually ignored the most important element in all this: your clients. No matter whether you choose the potentially expensive—yet highly effective—tactic of getting a third party to interview your clients or the far more modest approach to written feedback described above, you'll need to know why your clients might consent to participate in a survey program. A few reasons come to mind:

- People like being asked for their opinions, especially when they know they'll be valued.
- Clients will appreciate that you've made some effort to manage the relationship beyond just the service you're providing.
- Much of the time, clients don't want to bother with finding a new vendor to provide the services they get from you—even if they have some points of dissatisfaction. This process helps ensure that they won't have to expend the effort to find and build a new relationship.
- Feedback programs can help guarantee that the client's agenda remains the focus, so that they can get greater value from your work together without greater expenditure.

Don't overlook the hidden benefits of regular feedback.

The cost—in terms of both time and money—of building a client feedback system is small compared with the potential cost of losing clients and having to chase down new ones to replace them. It might even help you deepen client relationships so that you get more of their business. Even if that doesn't happen, it will raise the relationship to a whole new level, and both the firm and the client will get more from your work together. And there's an added benefit that, while hard to measure, can be invaluable. The discipline of asking for feedback in a regular, focused way means that you have to be clear concerning what your business is about and what you're really trying to accomplish with it. You may find that alone worth the cost and the effort.

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