

Best Practices in Client Feedback: How Firms Launch & Grow Successful Programs

Q: How do most firms overcome internal resistance to client interviews?

A: At most firms there are typically some partners who support the idea of client interviews and others who don't. It often makes sense to initially focus efforts, sometimes in a small pilot, only on those who are open to the concept of client interviews. In the pilot, we recommend focusing on interviewing clients which are happy, but undeveloped clients Opportunities.

Q: Are there secrets to a successful pilot program?

A: Yes, many. An example: focus not only on getting feedback, but also – using a proven methodology -- on capturing competitive intelligence and detecting opportunities for additional work. Done successfully, this often quickly yields an obvious ROI for the initiative. As a result, often initially weary partners start to buy-in to the idea of having their clients interviewed. Also, it is critical to reinforce that feedback interviews do not replace “thank you” visits from firm leadership, but rather supplement those ongoing client interactions.

Q: How do firms decide whether to do in-person interviews, written/electronic questionnaires or telephone surveys?

A: It often makes sense for firms to focus on both quantitative and qualitative client feedback. For quantitative feedback, usually on the firm's performance across a broad cross-section of clients, written or telephone interviews often make the most sense, in large part due to time, scale and cost. For qualitative feedback on a carefully selected list of clients, perhaps with an aim toward strengthening and ideally growing key relationships, there is no substitute for in-person interviews.

Caveat Emptor: The risk firms take when only conducting a written or phone interview is that clients often view this as a one-way communication, where they give their time to the firm, but get little, or nothing in return. An in-person interview is a dialogue that has a natural give and take.

Q: How do firms decide which clients to interview?

A: We often work with firms on how to analyze their client base at the beginning of qualitative feedback initiative. To do that, we identify three tiers of clients for prospective client feedback. For example, **Tier One** clients may be the largest clients of the firm. **Tier Two** clients might be generally happy but underdeveloped clients. **Tier Three** clients might be clients with which there are known issues, such as a decline in

billings over time. We find it often makes good sense to start by initially focusing efforts on Tier Two clients, in order to quickly receive a significant ROI and at the same time build internal enthusiasm for a broader client feedback program.

Q: Who should actually conduct the interviews?

A: Our only hard and fast rule in this area is that the relationship partner should not be interviewing her or his own clients. Otherwise, firms have several options on who does the interviews. The most common approach: firms get trained on a proven methodology and approach, and then the firm conducts some of the interviews itself, and selects a third party to do the rest. In many cases, firms completely outsource the entire process.

Q: What are the deliverables after interviews are conducted?

A: In our process, a key deliverable is a comprehensive written report, often running 10-15 pages or more, which is organized by person interviewed and subject discussed. The report includes extensive direct quotes, analysis, and perhaps most importantly, a series of actionable recommendations to enhance and grow the relationship. These actionable items are critical to the programs success: it enables partners to have a clear roadmap for following up with the clients soon after the interviews are conducted.

Q: Are there options to get help for firms committed to doing all interviews on its own?

A: Yes. We offer training on our methodology and approach, and have developed ClientKit™, which is essentially our industry-tested client feedback program in a box. It contains all the resources firms need to jump-start their client feedback programs.

Q: How are conflicts and confidentiality handled?

A: Wicker Park Group clients are covered by comprehensive conflicts and confidentiality policies; the information gathered about firms and their clients remains confidential. Interviewees are encouraged not to disclose attorney-client privileged information.

The Wicker Park Group conducts client feedback interviews to help lawyers and other professionals enhance their client relationships. To learn more or sign-up for future releases of this publication, please visit www.wickerparkgroup.com.