

OREGON LAW PRACTICE MANAGEMENT

Be Brave! Ask Clients How You're Doing

Are you meeting your clients' needs? Or do you assume you are meeting clients' needs because you haven't received any complaints lately?

If the latter is true, it's time to screw up your courage and start sending client surveys. A well-written client survey will quickly let you know what you're doing right and what you need to improve.

So how do you go about surveying clients? You could certainly survey a group en masse – online or by mail. But the easiest approach is to incorporate client surveys into your file closing process. Each time you close a client file, send a disengagement letter followed by a client survey.

If you prefer the online approach, try [Survey Monkey](#), [Zoomerang](#), or [Constant Contact](#). [Survey Monkey](#) and [Zoomerang](#) both offer free "basic accounts." [Constant Contact](#) starts at \$15/month and offers a 60 day free trial. The best part of an online survey? Results are compiled for you. (The bigger your survey group, the more apparent this benefit becomes.)

If you mail surveys to clients, be sure to include a pre-addressed, postage-paid envelope to ensure the highest rate of return.

In either case, give clients the option of responding anonymously.

What Should You Ask?

Survey questions can be open-ended:

- Were you treated by the attorneys and staff in a courteous and professional manner?
- Were you fully informed of all important matters relating to your case?
- Did you feel adequately prepared for any difficult stages of your case?
- Did we meet or exceed your expectations in your case?

Or you can limit the client's response to a rating or yes/no answer:

What is your opinion about the following?	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
Convenience of the office location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comfort and appearance of reception area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff helpfulness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Courteousness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of reaching your lawyer on the telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promptness in returning telephone calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promptness in responding to e-mail, if applicable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clarity of lawyer's explanations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you feel you could have handled your case as well without a lawyer?				<input type="checkbox"/> Yes <input type="checkbox"/> No
Would you ask our firm to handle another case for you?				<input type="checkbox"/> Yes <input type="checkbox"/> No
Would you refer a friend to our firm?				<input type="checkbox"/> Yes <input type="checkbox"/> No

Samples of both styles of surveys are available on the [PLF Web site](#). Select Practice Aids and Forms, then Client Relations.

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