Purchasers' Pleasure:

Feedback Is Key to Excellent Client Service

Almost a dozen years ago, Benesch developed a formal client assessment program. Of course, client assessment itself is not novel. Most law firms have embraced some method for collecting client feedback.

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But often this takes the shape of a perfunctory survey. Instead, our firm wanted to make it a priority to hear genuine feedback and then act on it. Ira Kaplan, our Executive Chairman, believes this program is essential to our success in servicing our clients. "Our number-one priority is providing excellent service, and that means communicating in meaningful ways with our clients to ensure we are on the same page," he says.

Basic Objectives

The program begins with a visit by the Chairman of the Firm or a member of the Executive Committee, along with the Director of Client Service, to a client with whom we have a legacy relationship, or one with a potential for growth. The client's relationship partner helps to prepare for the assessment, but is not part of the meeting.

The purpose of this is so a client can talk openly about his/her experience with an attorney and his/her team, and also to make it clear that there is no sales component of these meetings. The majority of the assessments are done face-to-face, but there are times when a telephone assessment is conducted.

The main purpose of these assessments is to find out how we are doing. What can we be doing better? Is there anything that other providers are doing that you want us to be doing? And the ultimate question: Would you refer us to another potential client?

We've conducted approximately 300 of these assessments and have always found valuable information that not only helps us continue to provide high-quality service, but also allows us to hear the voice of our client and understand their challenges so that we can provide proactive counsel and solutions.

Subsequent Actions

There are times when we have assumed a client is satisfied only to learn in the meeting that they are unhappy with some element of the work. For example, we might hear about a problem with clashing personalities on a team. Though of course we're never happy to learn about issues like these, a heads-up early on in the feedback process allows us to take immediate action and get out ahead of issues before they become problems.

And some of what we've learned has prompted policy changes across the board that benefit all our clients. Feedback on billing and communications prompted us to create an "on-boarding package" that goes to all new clients to learn their preferences for billing and communication and provides a quick-reference guide on whom to contact within the firm for various questions and concerns.

In-person meetings also allow us to get a feel for the kind of relationship a given client would like to have with our firm. Are they comfortable with the frequency of communications? Would they like more outreach, or less? Would they like to be invited to more social activities, or stick to work only?

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Another thing we learn in these periodic assessments is the client's plans for the future, which sometimes creates new opportunities for our firm to be of service. We might, for example, hear that the client is opening a new branch in another state where our firm has contacts in construction law and can help facilitate the upcoming project. We also offer free training in a variety of subjects, and when clients sign up for this we often learn about business goals we can help them achieve.

This expanded business develops organically and is always fueled by the client's expressed needs. That makes it win-win.

The key to a successful assessment cycle is following up. After our assessment meetings, the member of the Executive Committee and the Director of Client Service compile their notes and communicate what they've learned to key team members, particularly the relationship attorney. It's great when we can pass along praise from happy clients, but it's just as important to share areas that need improvement. Next, Client Service creates a list of action items to make sure our firm delivers on the client's requests.

Time and again, we've seen the value this formal process provides our clients. They know we are serious about hearing their feedback, and that we will act on it to continually improve service. It is a smart use of resources, and an integral part of our business plan.

—Jeanne Hammerstrom

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