

Practice Resource

Client survey

This survey is short and limited in scope, but should be a useful reference for lawyers who are interested in building stronger client relations.

The changes you make as a result of a client survey should reflect your goals in practice. What are those goals? How do you think your clients see you? How do you want your clients to see you?

You may wish to send a survey with your account, demonstrating that you care about your client's satisfaction with your work, as well as your payment for the work.

Before conducting a client survey, however, ask yourself whether you are really prepared to make changes once you receive the responses. If a client expresses unhappiness when asked to comment on your services, you should take some action. You will be marketing to your own clients — probably a better use of your marketing budget than advertising for new clients.

Model client survey

Did you feel welcome the first time you walked into the office? Yes No

If not, why not?

Did the receptionist call you by name? Yes No

Did someone offer to:

Take your coat? Yes No

Get you some coffee Yes No

Tell you how long you would have to wait? Yes No

Did the lawyer take time to listen to everything you wanted to say? Yes No

Did the lawyer:

Ask what goals you wanted to achieve? Yes No

Tell you how the lawyer was going to try to achieve your goals? Yes No

Obtain your instructions and approval on the course of action? Yes No

Tell you how long the process would take? Yes No

Tell you how fees were charged? Yes No

Estimate your total bill? Yes No

Explain that you would be making decisions about your case? Yes No

Keep you informed of developments? Yes No

Promptly respond to your requests? Yes No

Promptly return your phone calls? Yes No

Promptly reply to your letters and/or email messages? Yes No

Did we meet your expectations?

Yes, very well, in the following areas

Somewhat, in the following areas

No. Improvement could be made in the following areas:

Thank you for taking the time to answer these questions. We will review your answers and strive to make appropriate changes to serve you and our other clients better. We thank you for selecting us as your lawyers and helping us to improve our client service.

Name (optional): _____

Date: _____