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Client Surveys for Law Firms

(a ClearlyRated preview)



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Agenda for the webinar

- Key terms and ideas
- Correlation between client satisfaction and firm growth
- Common missed opportunities with survey initiatives
- ClearlyRated survey preview
- Client experience preview
- Reporting preview
- Q&A

Key Terms & Ideas

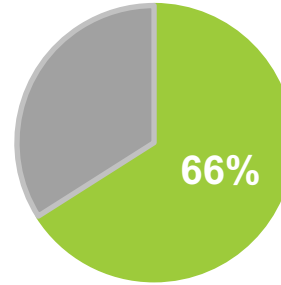
- **“Client survey”** – we’re specifically talking about digital client satisfaction surveys.

Here’s why...

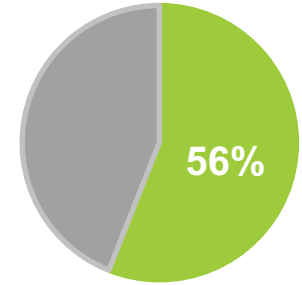
Digital surveys are a highly productive use of resources.

Net Promoter Score (NPS) question

NPS Driver Questions



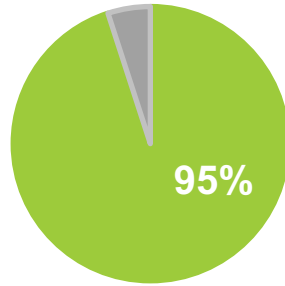
66% of legal clients say they are more likely to take the time to provide feedback through a survey than in-person.



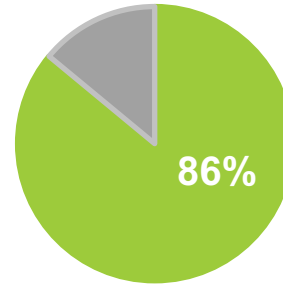
56% of legal clients say they are more likely to be candid with their feedback in an online survey than in-person.

SOURCE: ClearlyRated 2018

Clients are *ready* to be asked for their feedback.



95% of law firm clients say it's important to have an open channel of communication to provide feedback to their firm.



86% say that when asked for feedback, their perception of their law firm is positively impacted.

SOURCE: ClearlyRated 2018

Key Terms & Ideas

- “**Client survey**” – we’re specifically talking about digital client satisfaction surveys.
- “**NPS®**” – or “Net Promoter® Score” – a leading client survey methodology that measures client satisfaction, loyalty, and refrerability.

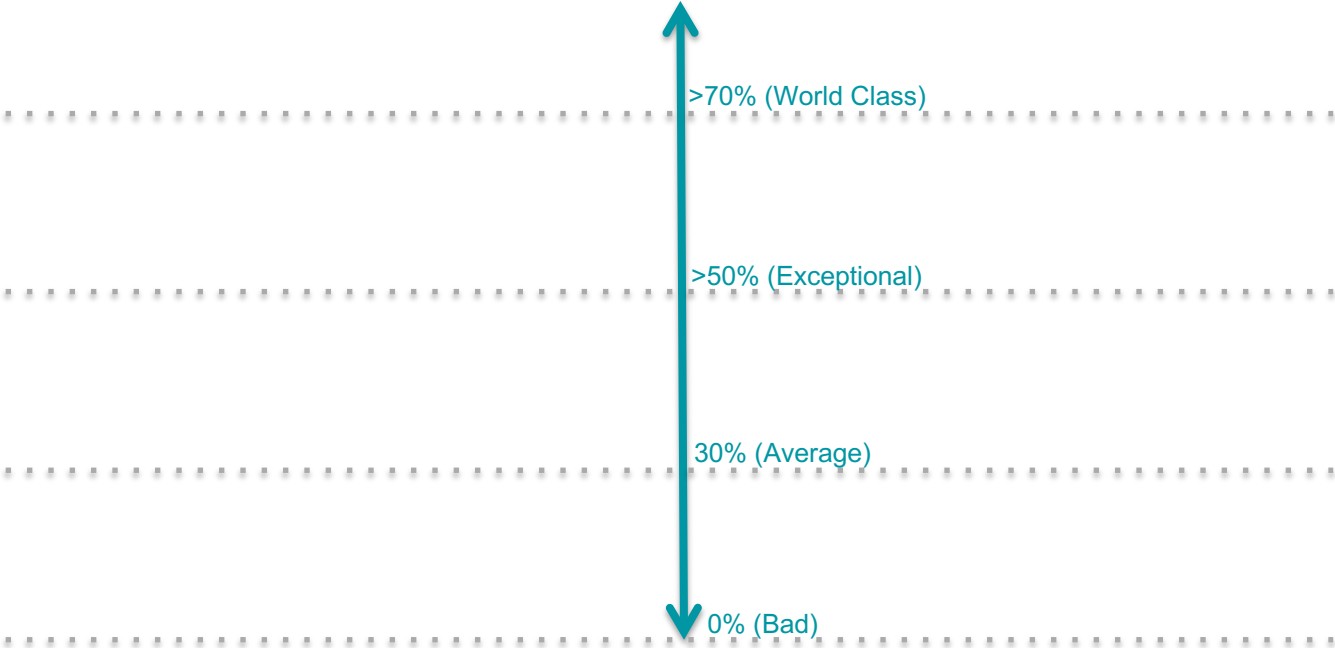
Net Promoter® Methodology

How likely are you to recommend our firm to a friend or colleague?

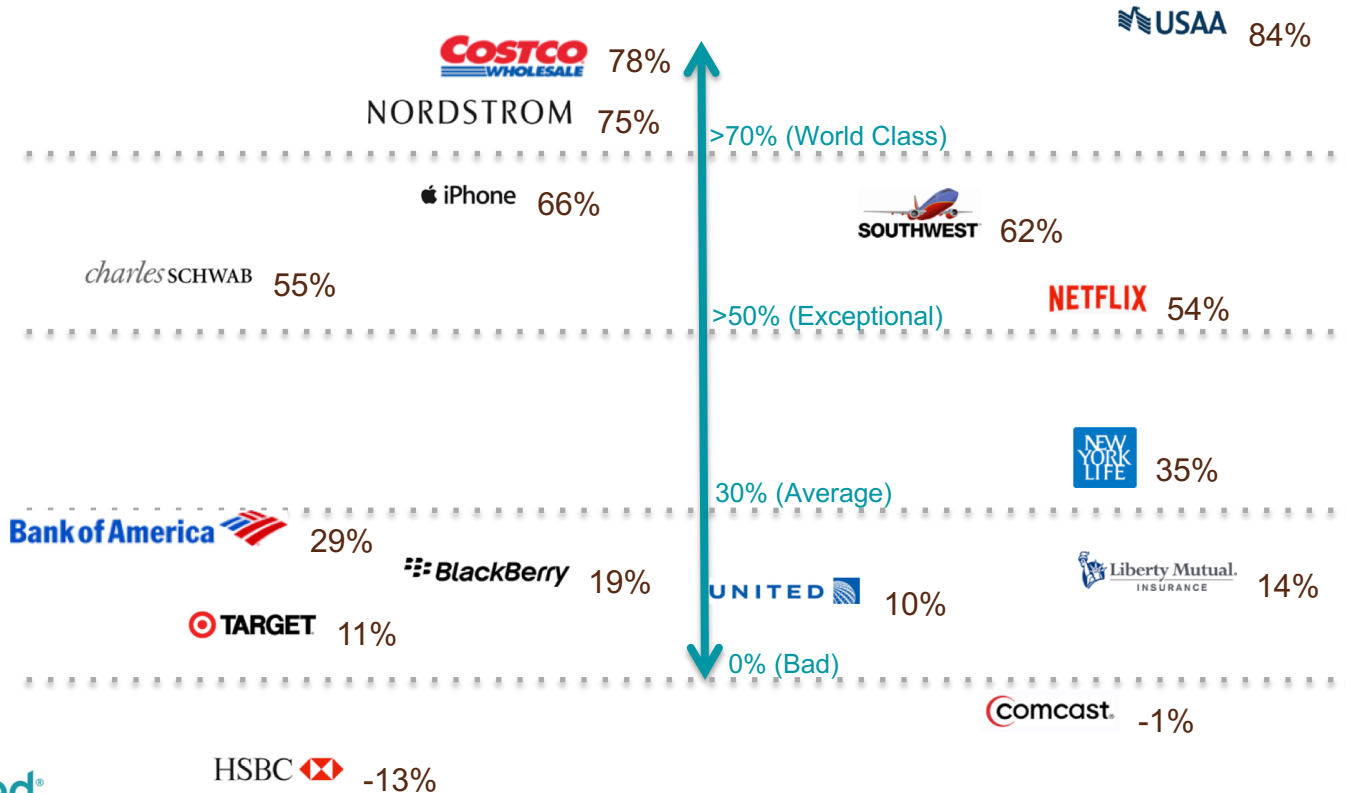


$$\text{Net Promoter® Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

Global NPS Standards



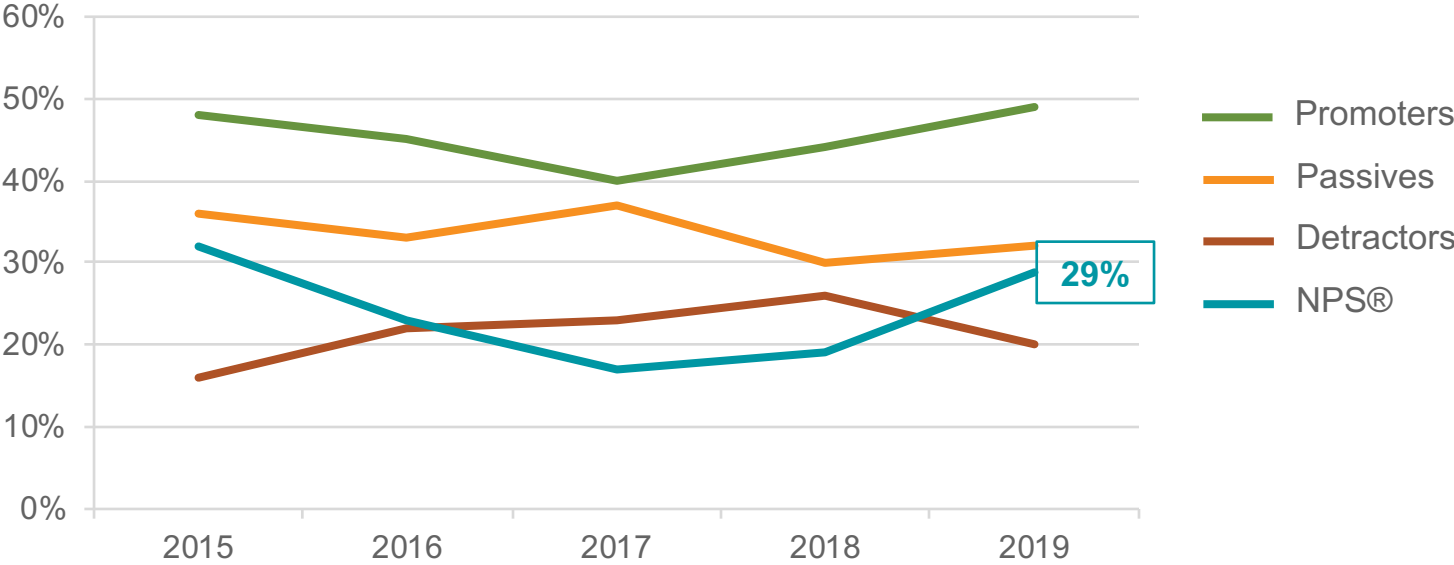
NPS Across Industries



Why Net Promoter® Score?

- Directly tied to growth strategy for service firms – **referrals**.
- Single metric to **benchmark** against the industry and across other world-class service quality organizations.
- Creates service **awareness** and makes service quality an **accessible** goal across the organization.
- Measures **loyalty behavior as a proxy for client perception** – helps client remove their own bias about what constitutes “good” or “great” service.

Legal Industry NPS® Benchmark



SOURCE: ClearlyRated 2019

Key Terms & Ideas

- “**Client survey**” – we’re specifically talking about digital client satisfaction surveys.
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24% of legal clients report having experienced a service issue with their law firm.

Correlation between happy clients and revenue health

Compared to Detractors, Promoters of their primary law firm are...

More committed to only using their current primary law firm

46%

more likely to be fully committed

Less likely to plan a decrease in annual spend with their primary law firm

3.2x

less likely to decrease spend

More likely to provide a testimonial for their primary law firm

13x

"very likely" to provide a testimonial

More likely to share an online, public review for their primary law firm, if asked

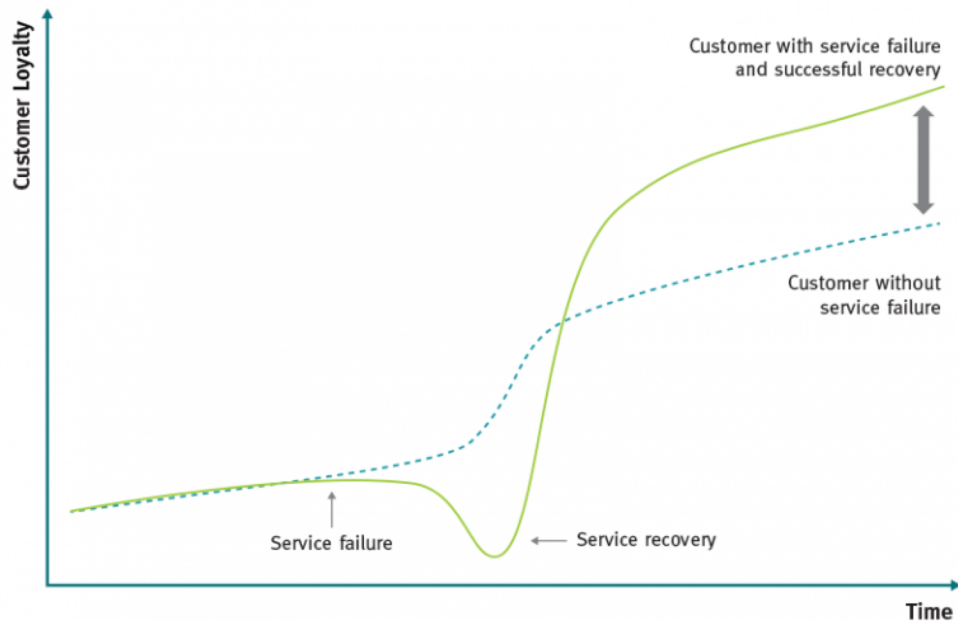
62%

more likely to provide an online review

SOURCE: 2019 Legal Buyer Benchmark Report

Common missed opportunities to maximize the ROI of your survey initiative...

- Avoiding conversations with less-than-happy clients.



Common missed opportunities to maximize the ROI of your survey initiative...

- Avoiding conversations with less-than-happy clients.
- Not “scaling” access to client feedback internally.



Fragmented
Doesn't Scale



Efficient
Scalable

Common missed opportunities to maximize the ROI of your survey initiative...

- Avoiding conversations with less-than-happy clients.
- Not “scaling” access to client feedback internally.
- Not taking action on the feedback.

80 / 20



80% of your time should be spent responding to and taking action on feedback.



20% of your time should be spent on designing and implementing a survey.

Common missed opportunities to maximize the ROI of your survey initiative...

- Avoiding conversations with less-than-happy clients.
- Not “scaling” access to client feedback internally.
- Not taking action on the feedback.
- Not having a strategic plan in place to capitalize on positive feedback.

Promoters of their primary law firm are **13x more likely** to provide a testimonial and have stated their **willingness to refer**





The process of surveying your clients

Questions?

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