

## ON MANAGEMENT



Richard Gary

## Client Interviews

Law firms can learn a lot from clients — if only they would ask.

It's a simple proposition: There is no better way for a law firm to strengthen client relationships than to ask its clients for feedback in face-to-face interviews. And yet, surprisingly few firms seek out constructive criticism. Here I'll look at why client interviews are so important, outline the best ways to conduct them, and explore why many firms find them so difficult to undertake.

### Client Interviews. Why?

Some of the arguments in favor of client interviews are obvious. For instance, client interviews can often uncover red flags before any issues ripen into full-scale problems. And although quality, service and price trump personal relationships most of the time, it never hurts to let clients know how important they are to your firm. A direct request for feedback shows clients how much the firm values their business and how concerned the firm is about their satisfaction with its services.

But there are also more subtle justifications for client interviews that are just as important. Interviews can provide an opportunity to:

**Institutionalize and broaden the client relationship.** Someone other than the partner responsible for the firm's relationship

should conduct the interview. This provides a chance for the client to build additional contacts within the firm and also introduces an element of independence and objectivity. This is an important opportunity that can be good for both the firm and the client, but at some firms it may threaten a responsible partner who feels that he or she "owns" the client in question.

#### Identify cross-selling opportunities.

In the course of conducting client interviews, firms often discover ways to broaden the scope of services they provide to clients. Cross-selling should never be the principal reason to conduct a client interview, but it is often a welcome secondary benefit.

**Develop a better sense of the firm's identity.** One important by-product of client interviews is a general sense of how clients, as outsiders, view a firm and its services.

In my consulting practice, I find that there are common themes that run through client interviews, which can often

be synthesized into a value proposition. For example, after a recent series of interviews for one of my mid-size client firms, I found three recurring themes.

- Top-quality lawyering. This is reflected in client perceptions of technical excellence and legal skills.

- Known-quantity lawyering. This is often illustrated by praise from clients who say that from the outset they knew the lawyers who would work on, and be accountable for, their matters. In a thinly veiled criticism of larger firms, several interviewees noted that when they received my client's invoices, they knew they would not see time entries by lawyers they could not identify for work they couldn't remember authorizing.

- Value. This is a measure of client satisfaction with cost in relation to services performed or results achieved.

No one at this client firm will ever again be stuck for an answer to: How do you distinguish your firm from its competitors? While, in and of themselves, these factors may not be eyebrow raising, the important thing to note is that this particular value proposition was a direct result of the client interview process and reflected actual, rather than hoped-for, client perceptions.

### Client Interviews. How?

Once a decision to interview clients has been reached, new questions arise: which clients should be interviewed, who should

conduct the interviews, and how should they be conducted?

**Which clients to interview.** Each client that sends a material quantity of work to the firm should be interviewed periodically. The definition of “material” will vary from firm to firm, but I think that any client that regularly provides, say, 1 percent of a firm’s annual revenue meets this standard. And every important client — for this purpose, let’s say a firm’s top 25 clients in terms of revenue — should be interviewed at least annually.

**Who should conduct the interview.** There are three choices here — the partner responsible for the client relationship, other partners (or employees) of the firm, or third-party consultants. I’ll take them in order:

- The partner responsible for the client relationship is the worst choice because he or she lacks an independent perspective. To get the most out of the process, you want candid, unfiltered feedback, and the responsible partner may not be willing to ask the hard questions. Even so, the responsible partner may not be prepared to report constructive criticism back to the firm.

- Some firms use other partners or firm employees to conduct client interviews. Members of firm management or the firm’s marketing director often play this role. I like the result, because these people are independent, and they know the firm well enough to speak with authority when clients raise issues or present opportunities for cross-selling.

- An independent, outside consultant is also a good choice so long as the consultant knows the firm and is well informed about the client relationship. When I’m asked to interview a firm’s clients, I always talk with the responsible partner beforehand.

**How to conduct the interview.** It’s best to conduct face-to-face interviews. It’s the most time-consuming and expensive method, but the advantages far outweigh the disadvantages. A telephone interview is a good second choice. Other interview or survey methods include written or online questionnaires. Firms can use a variety of online tools, such as [surveymonkey.com](http://surveymonkey.com) or [zoomerang.com](http://zoomerang.com). Online surveys are an especially useful way to obtain feedback from clients whose value to the firm doesn’t justify the time and effort involved in face-to-face meetings.

**Client interviews. Why don’t more firms conduct them?**

In many cases, I know why more firms

## What To Ask in the Client Interview

The appropriate line of questioning depends on who is doing the asking and whether there are any known issues that need to be addressed. Here is a brief list of the questions I usually ask when conducting client interviews on behalf of law firms. Remember that, as an outsider, I may ask certain questions about the nature of the relationship that members of the firm would be unlikely to raise.

1. Please describe the nature of your company’s relationship with the firm. When did the relationship begin and how did it evolve to its present status?
2. What is the principal role that the law firm plays for your company? Do you expect this role to change in the foreseeable future?
3. What are the firm’s strengths; its weaknesses?
4. Do you believe that you receive good value for your legal services dollar? Please explain.
5. Are you satisfied with the quality of the

firm’s work product? Please explain.

6. Aside from quality, are you satisfied with the level of service you receive from the firm? Please explain.
7. What are your perceptions of the firm’s position in the marketplace relative to its competitors?
8. Are there additional services or resources that the law firm could or should bring to bear on its relationship with you?
9. And, of course, client-specific issues that will vary from client to client.

-R.G.

don’t interview their clients. Responsible partners, billing partners, client partners — whatever they’re called at your firm — are often to blame.

Most client partners think they know everything there is to know about the client relationship. To illustrate, I’ll come clean about one of my own experiences. Many years ago, I left my firm to join the in-house legal staff of one of our principal clients — a client with which I was very familiar and for which I had played an important role. I had always guessed that my firm handled probably 75 percent of the client’s outside legal work and that it used perhaps three or four other law firms. Needless to say, I was shocked when I learned that my former firm represented just 25 percent of the client’s annual budget for outside counsel, and the client employed 20 or so firms. It was a valuable lesson in how much I didn’t know about the client and the true nature of the relationship.

Many client partners — especially those who work at eat-what-you-kill firms where selfishness is rewarded and collaboration is discouraged — do everything they can to protect their client relationships from interference. They drag their feet, dream up excuses, and create obstacles to client interview programs. Granted, not all firms are like this, and more firms are beginning to ask their clients for feedback. But show me a firm that doesn’t seek client

feedback, and nine times out of ten, I’ll show you a firm where partners hoard client relationships. These firms are vulnerable because departing partners are more likely to take their clients with them — as if the clients belonged to them personally rather than to the firm.

So what is the lesson in all this? If you want to improve client service, strengthen and institutionalize your firm’s client relationships, and develop a better sense of your firm’s identity, you should adopt and implement a client interview program. Who knows? You might even uncover a valuable cross-selling opportunity and burnish your firm’s reputation in the process. **LFI**

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