

Mirror Surveys – Testing a firm’s knowledge of their clients

This article is aimed at every professional manager in a law firm who has sat in a meeting and had an idea or project rejected because the lawyers present have claimed the proposal isn’t inline with what their clients want. Without evidence to the contrary this is difficult to argue.

Knowledge of what a client wants or thinks is very powerful information within professional services, however what a firm *thinks* clients want, and what clients *actually* want, can often be worlds apart.

What is a mirror survey?

Running a mirror survey is the process of getting professional staff to complete exactly the same client satisfaction survey as their clients. Staff are asked to put themselves in the shoes of their clients and answer the satisfaction questions as they believe their clients would.

Of particular benefit, staff are also asked to rank service components from the perspective of their clients, from most important to least.

The survey results of staff are then directly comparable to those of their client base.

The power of mirror surveys

The potential power of mirror surveys arises when you compare what your staff think, to what their clients are actually telling you.

Nothing is more important to a lawyer than his/her client base and mirror surveys can be used as an invaluable tool to ensure alignment between the two, and to reinforce the shared objective of management and professionals to improve client service. It’s a simple and effective way to get buy-in.

The gaps and misconceptions of staff when compared to clients generally provide plenty of scope for the management of a firm to implement change. It is very hard for partners and other staff to argue that they know all about what their clients want and think if you have survey results showing that in fact they don’t.

On the other hand, if the results of staff are actually a close match to clients, then as professional managers, you now have proof that you should indeed listen to the views of your lawyers and align client services, and firm resources, accordingly.

What are the results telling us?

The first result set that you should be examining is a simple comparison of what the firms’ staff *think* is **important** to clients, versus what clients *say* is important to them. The implications of differences here are fairly straight forward. Any firm should be focused on the service components that clients consider the most important and if these are different to what the staff themselves think are client priorities, an education process must be put in place to address and correct the imbalance.

The second set of results to be examined is that of the *actual* **satisfaction levels** of clients, versus the level of satisfaction your staff *think* their clients are feeling. There are two outcomes possible here; either staff believe that clients are happier than they really are, or staff think that clients are less satisfied than the results suggest.

- **If results show your staff think their clients are happier than they really are**, this is possibly a sign of complacency on the part of the firm – “Clients love the commercially relevant advice we provide” say partners versus clients saying quantifiably that they don’t and, perhaps in addition, that their level of satisfaction in this area is also below industry standard.

This kind of factual discrepancy can often provide the leverage that a professional manager needs to get a client-driven service improvement project off the ground and supported by the firm.

- If results show staff consistently *underestimating* the level of client satisfaction with their service, particularly if staff think that they are underperforming compared to the rest of the industry, there is possibly a morale issue that needs addressing. There is almost definitely a need for staff education in this instance, designed to positively highlight for staff the quality of service that clients are experiencing and the strengths of your firm's offerings.

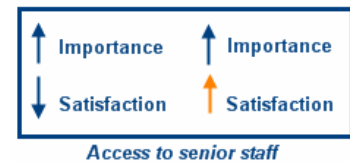
Turning the results into action

Running the mirror survey is one thing; knowing what to do with the results is something else again. To try and illustrate how results can be linked to action here is an example from a survey we recently conducted.

Example:

As a result of a mirror survey we recently conducted regarding the consulting services offered by our firm we turned up two very interesting items:

- Clients were very satisfied with the work performed by our junior staff, but ranked junior staff outputs as being of relatively low in importance to them. *In contrast, our mirror survey results showed we thought that clients were far less happy with the work of our juniors than they actually were. We also thought access to junior staff was of higher importance to our clients than it turned out to be;*
- On the other hand, clients were not as happy with the level of access they had to senior staff and this was a very high priority for them. *Our mirror survey showed that we too thought that this was important to clients, but it also showed that we thought our clients were happier with this area than was actually the case;*



So what did we do with this information?

- We worked on raising the profile of junior staff with our clients and emphasising the quality of their work, and the cost effectiveness of having them do it. In other words, we attempted to raise the importance level of having junior staff do their work (where appropriate).
- We also acknowledged that clients needed more access to senior staff. We addressed this in two ways.
 - Firstly, by emphasising the skills and value of junior staff we hoped to lessen the perceived importance of senior staff.
 - Secondly, we became more conscious of the accessibility of senior staff and through better usage of internal support staff we have worked on freeing up senior staff so they could focus more on clients, and be more visible in their efforts.

How did this turn out? So far, based on the actual client feedback, our senior and junior staff have supported the changes and anecdotal client feedback has been very good. In a couple of months we'll run the surveys again, both mirror and client, to see if we've made the progress we expect. We're confident at that time we'll see greater alignment of client and staff priorities and increased levels of client satisfaction as a result.

Summary

Holding the knowledge of what clients want and think is a powerful tool in any professional services firm. Given the personal and detailed nature of lawyer/client relationships, most professionals believe they have this knowledge already. But most often they don't.

By stepping back a little and conducting a formal mirror survey, a firm is given hard evidence of what clients want and think, and what your staff think in comparison. This allows you to very quickly focus on narrowing the service and understanding gaps and make changes that make a difference to your clients.

A firm can only be successful in the long run by providing a service that clients want and value. Mirror surveys conducted regularly can be an excellent mechanism for tracking how close you are to providing what your clients tell you they want and highlighting the areas you need to work on.