

2008

# Survey Commentary

## Sample & Associates

All employees completed surveys to assess the organization's marketing engagement level and client experience during development of the proposed marketing plan. Consolidated, de-identified survey results are provided along with a commentary and preliminary recommendations for improvements.



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## **Sample & Associates Survey Results**

This illustrative survey displays the results from a client of the Customer Research Center—identified only as “Sample & Associates.” The CRC will conduct a variety of surveys during the course of our interviews to ensure that we have some comparable scaled data across the organization to support the anecdotal comments that are gathered. The point of this engagement was to develop a marketing plan, but these same questions could be used to support a broader strategic analysis or a narrower, but deeper, dive into a particular aspect of a firm’s client experience or loyalty drivers.

### **I. Marketing Engagement Survey Commentary**

Ten people participated in the marketing survey. Although the survey was completed against a six point scale, the results are shown in four categories: Strongly and Moderately Disagree are combined, Slightly Disagree and Slightly Agree remain distinct categories, while Moderately and Strongly Agree are also combined. The four point representation allows a clearer picture to emerge of the organization’s agreements and divergences. A consolidated spreadsheet, with the original six categories, is retained for anyone who wants to do additional analysis.

The internal marketing questionnaire asked 30 questions that explore the organization’s perceptions on 5 main areas associated with the firm’s marketing plan. These areas are: 1) alignment of marketing efforts with the firm’s strengths (brand cohesion), 2) perceptions of the effectiveness of current marketing efforts, 3) belief that more investment in marketing will bring positive financial results, 4) engagement of the employees in supporting marketing, and, 5) availability of time to support expanded marketing efforts.

The survey results provide a picture of the “Marketing Engagement” level for the organization as a whole. Obviously, the greater the level of Marketing Engagement, the more focused the entire organization is on achieving the firm’s revenue growth objectives. This increases the probability that everyone is “pulling on the oars” in a synchronized fashion that will drive increased revenue. Revenue growth is constrained by many other exogenous factors, but an organization’s engagement in marketing can be directly controlled and improved. At this the CRC does not provide benchmark data for the legal services sector. The absolute number can provide a directional indication of improvement or decline year-over-year if the survey is used, as recommended, on an annual basis.

#### **Alignment**

The first section of the marketing survey examines organizational alignment around the Sample & Associates brand. Brand identity is a critical success factor for marketing, even at small firms, because the brand, as perceived by clients and understood by each organization, informs much of the communication at the core of your public communication and the value proposition offered to clients. To the extent that the brand is well understood, clearly documented, and supported across the organization, clients will perceive a greater level of cohesiveness in their experience with the firm and will develop a higher level of confidence and trust in the organization.

A strong brand identity forms a bond or promise with potential clients and current clients that sets performance expectations for the firm. 80% of the Sample & Associates team believes that the firm keeps its promises to clients. 70% of the employees say they know what Sample & Associates stands for and 70% also say they think potential clients know. The survey asked if clients know what Sample & Associates stands for and 70% of employees choose Moderately and Strongly Agree.

**Recommendation:** write down a brief, straightforward statement of the Sample & Associates brand identity that can be shared with all employees and new hires. This statement could be developed as part of an all employee planning meeting or in a similar gathering. The final decision and wording on the brand statement should come from the owner or partners, but there should be significant and meaningful input and review across the employees. Consistent clear communication, both internally and externally, that is reflected and supported by the actions and beliefs of the firm’s leaders and employees, is the key to maintaining a strong brand identity.

1. Alignment		Strongly & Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately & Strongly Agree
	18. Clients know what the Firm stands for.	30%	0%	0%	70%
	05. Potential clients know what the Firm stands for.	0%	0%	30%	70%
	21. The Firm is well known in the community.	10%	20%	10%	60%
	02. The Firm has a clear competitive advantage.	10%	10%	20%	60%
	23. I know what the Firm stands for.	0%	10%	20%	70%
	12. The Firm always keeps its promises to clients.	0%	20%	0%	80%

## Effectiveness

The next series of questions explores the perceived effectiveness of the current marketing programs. The key question is number 25; about the level of organization across the Sample & Associates marketing program. 80% of the employees believe that the approach to marketing could be more organized.

**Recommendation:** the marketing plan that is currently being developed should improve the scores on this dimension, if it is adhered to consistently over an extended time. A marketing program cannot be solely reactive. There will always be crests and troughs in the number of referrals on a weekly, monthly, or quarterly basis; marketing must be a consistent focus and a continuous set of activities, with a clearly defined set of procedures and associated metrics for measuring effectiveness.

2. Effectiveness		Strongly & Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately & Strongly Agree
	06. The Firm always asks potential clients and existing clients for referrals.	20%	0%	40%	40%
	13. The Firm marketing programs are as effective as they can be.	10%	10%	30%	50%
	20. The Firm website is an effective source of referrals.	40%	10%	20%	30%
	25. The Firm has a very organized approach to marketing.	80%	0%	10%	10%
	29. I can think of ways to make The Firm marketing more effective.	40%	30%	10%	20%
	04. The Firm looks for new ways to Market to potential clients and existing clients.	0%	10%	50%	40%

## Return

The next section deals with the perception that increased investments in marketing will bring increased returns. There is a fair degree of confidence that an increased effort in marketing will bring in more clients. 90% of the employees believe that an increase in marketing efforts will result in increased numbers of clients. 60% see that more investment should be made in marketing. The overall perception is that there are opportunities for increased returns with increased investments in marketing for the firm.

**Recommendation:** Returns from marketing activities should start to be carefully tracked to determine the return-on-investment (ROI) from each of the current and proposed marketing channels. There is still much to be learned about which marketing channels will provide the greatest payback. Therefore tracking by channel should be started, including: volumes of activity (potential clients etc.), time spent, associated success rates, revenues and net profit. It may be prudent to start with a small pool of money allocated to these marketing channels and increase this pool to the right level as successful results are obtained. It may take some time before sufficient tracking data is available to drive the strategic marketing direction, therefore an analysis of existing historic data sources should be undertaken to establish a high level base line.

3. Return		Strongly & Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately & Strongly Agree
	01. Our marketing investments are large enough.	40%	30%	10%	20%
	10. The Firm gets a good return on its money from their marketing investments.	0%	20%	40%	40%
	14. The Firm gets enough referrals with its current marketing efforts.	20%	10%	30%	40%
	22. The Firm should focus on case work, not on marketing.	40%	40%	10%	10%
	28. More marketing is not going to bring in more clients.	90%	10%	0%	0%
	30. The Firm should invest more in marketing.	10%	0%	30%	60%

## Engagement

The section of the survey is the key to making the Sample & Associates Marketing Plan successful. There is a clear opportunity to enhance the effectiveness of the marketing program by increasing the number of employees who are actively engaged in the marketing efforts. At this stage only 30% of the employees believe that everyone in the firm supports the marketing efforts. Given the fact that the client experience and the legal advice provided to clients are significant factors in building the brand identity and generating referrals via word-of-mouth, everyone in the organization is actively involved in marketing whether they know it or not—however, this philosophy needs to be reinforced. 20% of the employees felt that they understood the current marketing activities.

**Recommendation:** Send a clear, simple, and consistent message to the organization, over and over, that providing superior advice and service to clients, establishing a warm, but professional client experience, and actively marketing Sample & Associates are all different, but related facets, of the same opportunity. Marketing cannot be an optional activity for anyone in the firm because everything the firm and its employees do is either enhancing or detracting from the marketing plan and the firm's brand identity. There does need to be some additional research completed on the activities that are

specifically allowed or disallowed for attorneys and paralegals as the organization needs clarity around supported activities in order to be effective and appropriately engaged. As the marketing plan is finalized it needs to be communicated fully to current employees and new hires to ensure everyone understands the firm’s direction and has the opportunity to fully support this effort. As a minimum this communication will consist of a set of “Rules of Engagement” supplemented with a high level tutorial on how to apply them.

4. Engagement		Strongly & Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately & Strongly Agree
	03. Everyone at the Firm supports our marketing efforts.	30%	20%	20%	30%
	08. I’m always looking for new ways to promote the Firm.	0%	30%	20%	50%
	16. I would like to be more involved in the Firm’s marketing efforts.	30%	0%	20%	50%
	19. I belong to groups, clubs and associations where I actively promote the Firm.	60%	10%	20%	10%
	24. I have a lot of ideas that would help our marketing plan.	20%	20%	30%	30%
	26. I understand our current marketing efforts.	20%	20%	40%	20%

#### Time

As noted in the previous section the CRC analysis did not look closely at the time element of employee engagement, but we did explore the time component of marketing engagement. There is good news in the responses to the questions about the availability of extra time to focus on the enhanced marketing plan. 70% of the employees thought Sample & Associates should spend more time on marketing and 60% slightly disagreed with the notion that they couldn’t afford to spend any more time on marketing, 20% strongly or moderately felt they could find more time. Certainly everyone in the firm is busy, but there was a strong belief, expressed in the interviews, that the increased focus on a coordinated marketing plan was a priority for which time simply had to be found.

**Recommendation:** This question is simply informative and no action needs to be taken.

5. Time		Strongly & Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately & Strongly Agree
	07. The Firm should be spending more time with clients, not marketing.	20%	60%	0%	20%
	09. I have extra time I could spend marketing the Firm.	40%	30%	20%	10%
	11. The Firm should spend more time on marketing.	0%	0%	30%	70%
	15. The Firm is very busy already, more clients would be difficult.	40%	40%	10%	10%
	17. There are a lot of ways I could help with marketing if I had time.	10%	20%	20%	50%
	27. I’m too busy to spend any time on marketing efforts.	20%	60%	10%	10%

## II. Client Experience Survey Commentary

The same ten people participated in the client experience survey. Although the survey was completed against a six point scale, the results are shown in four categories: Strongly and Moderately Disagree are combined, Slight Disagree and Slightly Agree remain distinct categories, while Moderately and Strongly Agree are also combined. The four point representation allows a clearer picture to emerge of the organization's agreements and divergences. A consolidated spreadsheet, with the original six categories, is available if anyone at the client wants to do additional analysis.

The internal client experience questionnaire asked 30 questions that explore the organization's perceptions on 5 main areas associated with the the Firm's marketing plan. These areas are: 1) understanding client's needs, 2) setting expectations, 3) meeting expectations, 4) value, and, 5) client loyalty.

The survey results provide a picture of the "Client Experience" as perceived by the internal organization. Once other priorities are completed it is informative and valuable to check this perception with the clients themselves across a random sample of 30-50 clients. The objective of the client experience is to create loyal clients who received valued services from Sample & Associates and who willingly recommend the firm to their family, friends, and business associates. The more loyal clients the business system creates, the greater the number of referrals that arrive without the need for incremental marketing investments and the greater the amount of repeat business from existing clients.

The internal perception of the client experience and the levels of client loyalty that should result are extremely positive in this illustrative survey for Sample & Associates. In many, if not most firms, the client experience is a key weakness in the overall brand strategy and an impediment to the marketing plan. Although most firms express a desire to focus on client needs, very few devote the resources and care required to set clear expectations, meet those expectations in a way that clients value, and truly develop a loyal following of current and former clients who actively support the business' success going forward. Sample & Associates employees believe strongly in the value of their service offerings, the integrity of their advice, and their advocacy on behalf of the clients. Once confirmed with external client surveys, this area, the client experience, should be a cornerstone of the overall brand image and a key supporting feature of the marketing plan.

The commentary and recommendations for the client experience are shorter than those found in Section I on Marketing Engagement because the current level of performance is higher.

### Understanding Client Needs

As expected there is little formal data collection about client needs, not much internal discussion of opportunities to improve service, or formal documentation about client needs. Nonetheless, 90% of the individuals in the firm feel that they understand what the clients need from them and 70% say that clients are an important focus across the firm.

**Recommendation:** A formal process for assessing client needs should be considered and a cultural shift toward continuous process improvement should be evaluated. There are significant improvements in client loyalty that can result from these efforts and dramatic reductions in both cost and cycle time that can result from an ongoing series of small improvements.

Documentation and training and in these areas would help instill a clearer sense of Sample & Associates as a business system wherein all the people and parts are interrelated and need continual maintenance,

care, and attention to work at their optimal levels. Small examples of gaps in the current business system can be found readily at this point (i.e., website menu picks that are empty, email addresses that are not monitored, referral data that is not collected, phone calls that are not efficiently allocated to attorneys, duplication of work on research, etc.). A small amount of training in process improvement would largely eliminate these small gaps from the organization relatively quickly.

<b>1. Understanding client needs</b>		<b>Strongly &amp; Moderately Disagree</b>	<b>Slightly Disagree</b>	<b>Slightly Agree</b>	<b>Moderately &amp; Strongly Agree</b>
	<b>01. The Firm regularly collects feedback from clients about their likes and dislikes.</b>	80%	10%	10%	0%
	<b>06. Client needs are an important focus at the Firm.</b>	20%	10%	0%	70%
	<b>11. I understand what our clients need.</b>	10%	0%	0%	90%
	<b>16. We discuss how to improve our service to clients.</b>	30%	20%	40%	10%
	<b>21. We understand how often clients want to hear from us.</b>	40%	10%	10%	40%
	<b>26. We have guidelines for dealing with clients.</b>	40%	20%	30%	10%

### Setting Expectations

In this section of the survey the organization’s perceptions of the clarity with which expectations are set is evaluated. Expectations, as noted earlier, are a key component of the brand image of the firm and the firm’s ability to generate and retain loyal clients over time. At some future point, focus groups should be conducted with prospective clients, clients, and former clients to determine, with a great deal more accuracy, the expectations that they consider critical. This brief survey assumes that communications, fees, information requirements and service promises are critical to clients. Although this may make intuitive sense, it needs to be confirmed with the clients.

Even given those caveats, the employees believe very strongly that clients understand the fee structure (70%), clients know what to expect from Sample (60%), clients understand the services (70%), and clients are told what information is required to provide them advice (100%). Equally importantly, the individuals believe that they know what clients need their position to do (100%).

**Recommendation:** Confirm with external client research before taking further action.

<b>2. Setting expectations</b>		<b>Strongly &amp; Moderately Disagree</b>	<b>Slightly Disagree</b>	<b>Slightly Agree</b>	<b>Moderately &amp; Strongly Agree</b>
	<b>02. I understand what clients need my position to do.</b>	0%	0%	0%	100%
	<b>07. Clients are told what information they need to provide us about their case.</b>	0%	0%	0%	100%
	<b>12. Clients understand the services that the Firm provides.</b>	0%	10%	20%	70%
	<b>17. We keep clients informed about the status of their case.</b>	0%	0%	50%	50%
	<b>22. Clients know what to expect when they become the Firm’s clients.</b>	30%	0%	10%	60%
	<b>27. Clients understand the fees they will be charged as clients.</b>	10%	20%	0%	70%

### Meeting Expectations

Once expectations are set, the priority is to meet those expectations by delivering what was promised. Even more critically, if those expectations are not going to be met, for any reason, to explain quickly and clearly where there are issues and lay out a course of action for remediation. Clients will almost always accept a mistake and remain, slightly shaken, but loyal if clear lines of communication are established and appropriate acknowledgements of any errors are offered. Clients will not forgive a mistake if it is not acknowledged or if difficult issues are dodged until it is too late to take corrective action. 100% of the employees believe that clients are told about difficult issues at Sample & Associates. 90% of the employees understand what to do when clients complain and 90% of the employees believe that clients are treated with respect and dignity. There are some opportunities for improvement. 30% of the employees believe that the client’s emotional needs are appropriately acknowledged. If we find, with additional research, that this is an important subject for the clients, then it may warrant more conversation and some amount of additional training. As discussed many times, these cases are highly emotional and all employees need to be prepared to respond effectively.

**Recommendations:** Pending further analysis with external clients, no action is required.

3. Meeting expectations		Strongly & Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately & Strongly Agree
	03. Clients emotional needs are appropriately acknowledged by the Firm’s employees.	10%	20%	40%	30%
	08. Clients are treated with respect and dignity at the Firm.	10%	0%	0%	90%
	13. I have ideas that might improve the client experience at the Firm.	0%	20%	20%	60%
	18. I know what to do when I get a client complaint.	0%	0%	10%	90%
	23. The Firm employees are on time to client meetings.	10%	10%	10%	70%
	28. Clients are told when there are difficult issues that may impact their case.	0%	0%	0%	100%

### Value

This section considers the employee’s perceptions that clients are receiving adequate value for the money they pay to Sample & Associates. Again, the results here were very strong. Along both the affective (i.e., emotional needs, such as being thanked for their business) and hard dollar dimensions (i.e., receiving valuable advice) the overwhelming consensus is that client’s are being provided with very good value for the investment they’re making in Sample & Associates. The high scores speak for themselves and the only area to focus on would be ensuring that clients are thanked for their business.

**Recommendation:** Pending confirmation with external clients, no action is required.

4. Value		Strongly & Moderately Disagree	Slightly Disagree	Slightly Agree	Moderately & Strongly Agree
	04. Clients are thanked for their business.	0%	30%	0%	70%
	09. Clients understand that the Firm values their business.	20%	0%	10%	70%
	14. Clients receive good value for the fees they spend with the Firm.	0%	0%	30%	70%
	19. Clients, whenever possible, get valuable advice from the Firm.	0%	0%	0%	100%

	<b>24. I understand the value of providing clients with a good experience.</b>	0%	0%	0%	100%
	<b>29. I take personal responsibility for making sure client's value the Firm.</b>	10%	0%	0%	90%

## Client Loyalty

In this section of the survey the impact of the prior four sections of the client experience are considered against our overall objective—building client loyalty. The internal perceptions of client loyalty, as in other parts of the client experience survey, show near unanimity on the key aspects of loyalty, willingness to refer others and an appreciation for the value received from the firm.

The objective should be to get the same level of performance across the marketing engagement questions that were achieved in client loyalty. By pairing a solid value proposition with a cohesive, rigorously executed marketing plan there is an opportunity to really leverage the firm's standing and expertise to the benefit of both future clients and the employees within the firm.

**Recommendation:** Leverage these loyal clients by communicating with former clients as part of the enhanced marketing plan. 60% of the employees believe that former clients do not receive regular communication. As most of the current referrals are driven by word-of-mouth these former clients may represent a large, untapped resource (some 5,000-10,000 people potentially) that are not engaged or involved in the firm's current success.

<b>5. Client loyalty</b>		<b>Strongly &amp; Moderately Disagree</b>	<b>Slightly Disagree</b>	<b>Slightly Agree</b>	<b>Moderately &amp; Strongly Agree</b>
	<b>05. Clients are loyal to the Firm and refer us to their associates and family for additional work.</b>	0%	0%	0%	100%
	<b>10. We welcome potential clients to our firm by name.</b>	10%	0%	0%	90%
	<b>15. Potential clients seldom have to wait long before meetings with the Firm.</b>	30%	0%	10%	60%
	<b>20. Former clients receive regular communication from the Firm.</b>	60%	20%	20%	0%
	<b>25. Clients are greeted warmly when they visit the Firm.</b>	10%	0%	10%	80%
	<b>30. Clients and former clients compliment the work done by the Firm.</b>	0%	0%	10%	90%