Listening to your Clients – Autumn 2013

It was great to see from the Annual Regulatory Return that many of you proactively record client satisfaction levels and, vitally, use the information to improve the service your firm offers.

Of the improvements made as a result of that feedback, the most common themes we have identified are

- ensuring there are appropriate systems for managing complaints received from clients
- regular and informative communications
- being clear about costs, and
- general client care

Here we provide useful examples of reported business improvements lines made as a result of client feedback. These are examples only, but why not get together with colleagues to think about whether these or any other ideas might help your business improve its service to clients in these competitive times.

Management structure/systems
Identifying and mitigating risks to accuracy - changes made to workflow, double-checking standard/case management letters, and providing support at an earlier stage in the transaction such as ensuring your client provides suitable evidence of the source of funds; and
Making clearer who is a client's main point of contact – for some, this has included reconfiguring offices and teams, for others, providing the client from the outset with the name of another lawyer within the firm for them to contact should their particular lawyer not be available.

Client Care
Promoting Confidentiality – offer a private office for clients when they bring in their instruction papers;
Motivating staff – monthly staff award to keep staff focused on good client service;
Training staff - providing training on client service and treating clients as persons;
Making the right calls at the right time – client care calls made during transaction and post-completion to determine any issues, making more frequent telephone contact with your client and responding promptly to concerns raised by clients; and
Client-friendly – using less jargon, initial letters provide general information on conveyancing and timescales, and staff directed to return phone calls within a short period (within 3 hours).

Communication
Offering Choice – clients able to choose own password, offered postal address re-direction, offered updates about their matter online by email, letter or phone;
Promptly answered calls – operator overspill facility for missed calls, changes made to inbound call queuing system to ensure clients are answered more promptly and by the correct team at the first point of contact, removal of voicemail and call routing within teams;
Email updates – new case tracker system provisions include more frequent email updates, a drive to communicate via email to improve turnaround times, and advising clients in initial letter to add firm's email addresses as a safe sender to prevent communications being placed in the recipient's email junk box.

Costs

Improving clarity and transparency of costs – an indication of all fees and disbursements which are likely to be charged is provided on website; changes made to estimate of charges, invoicing and statement layout production so clearer to clients.