



SURVEYING SUCCESS

Mark Brodaty explains how UK firm Eversheds LLP uses real-time client feedback to drive improvements in client care.

In this article we look at how an extensive programme of client feedback has been embedded into business processes at Eversheds LLP, producing tangible benefits in client retention.

The challenge of benefiting from client feedback

It is now generally well understood by professional services firms that long-term client relationships are essential to commercial success and that business decisions should not be made without reference to client opinions. Many law firms now have a system in place to collect and analyse client satisfaction data and use the results in a variety of ways to augment and deliver improved services.

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However, in many cases there has been too little thought given to the changes required in work practices to ensure that the data collected is used to maximum advantage.

All too often, the collection of client feedback is informal and unstructured, relying on the variable commitment and time of staff at all levels. Unfortunately, this *ad hoc* approach means that the knowledge base about client satisfaction is incomplete and lacks vital insights. This results in the firm knowing less than it should about its clients' opinions meaning the relationships it develops with them are not as close and are less profitable than they should be.

Even when third-party research companies are used to undertake client satisfaction studies, results are

often disseminated to only a few people in the firm and opportunities to drive client service improvements are lost.

Discovering and acting on client needs

Eversheds LLP have taken the necessary steps to ensure that it obtains and uses a complete view of its clients' opinions on a number of key satisfaction drivers.

Under the leadership of Geoff Harrison, head of client relationship management (CRM), Eversheds has developed a distinctive approach of working collaboratively with clients to meet their objectives over a number of years. The firm was one of the first to use independent partner reviews to evaluate the current state of key-client relationships and such

reviews are now fully integrated into how the firm interacts with clients.

It has an uncompromising commitment to discovering and acting upon its clients' real needs, which is embedded in its vision and its values. Meeting this vision entails a consistent evaluation of the service provided to all clients both during and after a client transaction.

Eversheds started out with four key objectives and these have changed very little over time.

These are:

- **Individual** – measuring satisfaction levels on specific projects and transactions, generating case studies of the



best and worst service levels and providing information to feed into staff performance reviews;

- **Aggregate** – measuring satisfaction levels for teams, offices, regions, practice groups, product groups, sectors and so on, generating management information, enabling performance benchmarking, supporting product improvement and delivery of service consistency;
- **Empirical evidence** – based on large numbers to support change programmes. Involves monitoring behavioural changes, evidence-based business planning and drivers for change;
- **Performance benchmarking** – relative to competitors (and other industries) in similar fields of work. Involves producing measurable differentiators against competitors, generating key sales messages (time savings, cost savings, value-added, satisfaction levels and so on).

Eversheds has devised a system of key performance indicators (KPIs) called the ‘10Cs’, which comprehensively encompass the drivers of client service and key practice areas. This includes how effectively they scope client work, how well they communicate with their clients and how well they understand clients’ business objectives.

Large-scale, real-time research

In 2004, to enable wide-reaching, independent client satisfaction evaluations based on the 10Cs, Eversheds appointed the UK-based research firm Acuigen Limited to carry out the surveys. Since these first surveys the process has become an essential aspect of Eversheds’ commitment to being the ‘most client-centred international law firm’.

To date, Acuigen has undertaken over 1000 surveys for the firm, the majority by telephone using its specialist in-house interviewing team. The client feedback obtained by them is provided via interactive real-time online reporting facilities, giving Eversheds rapid access to the results for dissemination around the firm.

As senior marketing manager at Eversheds it is my role to oversee the feedback process. There are several tiers of information available from the surveys, ranging from individual client feedback supplied to the client team that managed particular projects, to aggregated survey responses supplied to partners and others involved in devising systems and processes (such as quality, marketing and IT).

All research is then put right at the heart of our business and we have changed many of our working practices and approaches over the years as a direct result of this feedback.

Below we look at the key objectives described earlier:

- For **individual feedback**, our managing partner sees every single piece of client feedback and acts on

its information. For each piece of feedback, survey information is sent immediately to the client team concerned for rapid follow-up. If necessary, we escalate client views to more senior levels, right up to the managing partner. Each client partner has his or her client feedback scores taken into account during performance reviews and they are also part of the evaluation process when applications are made for promotion. Client feedback scores are, therefore, given equal weighting within the firm as financial performance indicators such as revenue and profitability – a stage that we know has not been reached in many other firms inside and outside our market;

- In **aggregate**, we look at the feedback by team, office, region and by different types of work to benchmark performance against the targets that have been set. We use a seven-point scale to evaluate performance (where seven is 'extremely satisfied') and our goal is to achieve overall satisfaction scores of six or seven for each and every client. We set these goals for all clients, and not just for a

Above all, we aspire to be the best of the best, and not just the best in legal or professional services. We have already put in place programmes to ensure we offer our clients more than just sector expertise. We know that, increasingly, clients will demand legal services providers with high levels of understanding about their organisations, culture, strategy and the business challenges they face.

As you can see, the client feedback we systematically collect has multiple applications. We keep engagement at high levels internally by using the information extensively in internal publications such as newsletters and case studies, in training workshops and in conference presentations.

In short, we have used what our clients say to us in every way we can to improve satisfaction scores and loyalty, grow our client base, improve productivity and profitability, adapt business processes and genuinely embed personalised client care at the centre of everything we do.

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percentage of clients, because we know what a profound difference to client experiences a shift from 'quite' satisfied to 'very' satisfied can make;

- In **empirical** terms, we have been able to use the client feedback to develop systems and undertake projects more effectively because we have a real understanding of what works best for individual clients and in particular circumstances. The result – our innovative and comprehensive approach to project management – has been recognised in many quarters, including at the *2008 Legal Marketing Awards* in which our firm triumphed in the CRM development category for our global account management system. Based on the client feedback, we also have the ability to plan future manpower and other resources far more efficiently than in the past, because we have evidence-based knowledge of likely demand for our service;
- Finally, looking at the **performance benchmarking** side, it is our objective to achieve the highest ratings for our performance (including service levels, value for money, commercial focus and expertise) when compared with other industries as well as other legal and professional services firms.

"In the recent past, it was relatively uncommon for legal firms to actively seek out the views of their clients on their wants and expectations in a systematic manner for an extended period," he explains. "Many firms now see the value of client intelligence and collect extensive client satisfaction data. Less common is for that vital intelligence to be integrated into the business processes of the firm like it has at Eversheds."

He adds: "It is no surprise that Eversheds' exemplary client care has become a differentiating factor in winning and retaining business. Its client-driven business model is hugely impressive and it is deservedly being recognised for its achievements."

In summary

Eversheds is committed in the long-term to listening to clients and growing ever closer to them because the approach has delivered so many tangible benefits. Given that the competitive environment is likely to become even more challenging, improving client relationships needs to be the central goal of every legal firm. ■

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