**[Your Law Firm] Client Interview Program Guide**

 Yolanda Cartusciello

 Partner

 PP&C Consulting

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1. **Program Objectives and Overview**

In March 2022 , [law firm] retained PP&C Consulting to conduct a client interview program, consisting an initial tranche of 10 clients and 3 law firm referral sources, which often act in the capacity of the client.

The firm has selected the clients to be invited into the process (page 6); these clients include top clients by revenue, clients with a long history with the firm, newer clients, clients from a variety of industries, clients who have transitioned to working with different members of the firm after a partner retirement, and clients who may experience a partner transition in the coming years.

Given the variety of types of clients represented, the objectives of the individual interviews may have some variations, but all will explore the state of the client, their appetite for outside counsel in a post-pandemic world, the strength of the relationship, opportunities for expansion, issues to be addressed, and changes they may see on the horizon that could affect the relationship.

Ultimately, the long-term objectives are to strengthen the overall client relationships, serve the client base more effectively, address issues and exploit opportunities through aggressive yet appropriate marketing and business development strategies.

This guide is meant to provide a brief overview of the process as well as the general questions to be asked during the course of the interviews. Amongst other pre-interview steps, PP&C will speak with the relevant partners to gather additional background information, and [law firm] will provide PP&C with relevant financial information about the client relationship as well as a list of current matters and the lawyers assigned to each of those matters.

After each interview, PP&C will prepare and send a formal report to the firm. Those reports will offer a question-by-question account of the clients’ responses to both the quantitative and qualitative inquiries.

PP&C will develop an overall summary of the findings including opportunities and issues that may need to be addressed at the firm level. It will include an analysis of the themes that emerged. It will also include a question-by-question report of the responses to a series of scoring questions that PP&C will pose to interviewees during the interview.

While the summary report will attempt to surface common opinions, it will be important to read the individual reports to gauge how each client feels about the firm.

1. **Pre-Interview Preparation**
2. Basic Research
	1. Company Background Research
	2. Industry Review
	3. Key Articles Esp. WRT to [firm-specific practice] issues
3. Client Snapshots
	1. Revenues for each of the past five years
	2. Major Assignments for each of the past five years
	3. Key Contacts
	4. Successful and Unsuccessful Pitches
	5. Recent or Upcoming Milestones
		1. Retirements
		2. New Senior Personnel
4. Partner Interviews
	1. Discuss key personnel, personalities and relationship with client
	2. Discuss any pandemic-related changes worth noting
	3. Discuss client-specific questions to be included
	4. Determine who should be interviewed
	5. Agree upon how clients should be invited to participate
5. Other Potential Pre-Interviews
	1. Relevant Alumni
	2. Relevant Researchers
	3. Other influencers in the Space/Other Referrers

1. **Clients For Inclusion – Round 1**
2. Sanitized
3. **Sample Email/Script Requesting Clients to Participate in Interview Program**

Dear\_\_\_\_\_\_,

[Law firm] has commissioned a client interview program, to gather the feedback of a small number of clients whose opinions we value.  Given the challenges inherent in the ever-changing business landscape and those we’ve all faced over the last year, we believe it is important that we ensure that [law firm] is meeting our clients’ expectations, both broad and specific.  The format is a 30-minute interview that will be scheduled at your convenience.

We have retained PP&C Consulting, a group that consults exclusively within the legal profession, to conduct the interviews on our behalf.  Their questions will center around your foreseeable needs and challenges, as well as your level of satisfaction with our service.  The questions have been designed to be thought-provoking and to stimulate discussion and candor. While I’d be happy to share the questions in advance, please don’t feel as if you need to “prepare” for this conversation.

I realize that you are incredibly busy, but given how much I personally respect you and your team, I couldn’t imagine not including ***[client name]*** in this process.  Our thought was to speak individually with \_\_\_\_\_\_, \_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_, as well as anyone else you would like to volunteer. If you are amenable, I will give her your name and details to our consultant, and she will contact you directly to set a time to speak over the next few weeks.  Please let me know if you have any questions or would like to discuss this further.

A million thanks in advance.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Draft Questions for [law firm] Client Feedback Project**

**Introduction:**

Whle the folliowng is the proposed guide to questions for clients during the interviews, please note that the questions are deliberately generic and can and should be augmented by client-specific questions. Also keep in mind that clients often go off on tangents and wish to discuss topics of most interest to them. While we will do our best to ensure that roughly all sections are covered, we often will skip a question or two in order to spend time on the most important components of the interview.

At the outset, PP&C interviewer will confirm with the clients, their titles, responsibility, direct knowledge of [law firm] and its work, and the size of their organization and/or department.

Sample:

Good morning. I’m Yolanda Cartusciello. As you may know, [law firm] has retained our consulting group to interview you so we can get feedback about its services to your company.

This interview is part of [law firm’s] commitment to provide excellent service and legal work. The firm believes one of the best ways to do that is to speak to its most important clients and hear their views. Your comments will be reported back to the firm’s leadership, but I can also speak with you “off the record” about any particular issues that you’d like and we can work together to find a way to communicate the substance of the comments back to the firm in a manner in which you feel comfortable. Thank you for agreeing to participate in this project.

**Questions About the Client:**

At the outset, I would like to ask a few basic questions about you and your organization

1. In addition to your legal responsibilities, what are your other responsibilities at your company?
2. How much time do you actually spend doing what you consider legal work?
3. Given the pandemic has challenged all companies, I’m assuming your organization is no different. However, if there are particular challenges that have not only evolved since the pandemic, but may remain long after the “new normal” is established, I’d be interested in knowing a bit more about those.
4. Do you forsee any particular changes to your role in the next 6-18 months or the structure of your group?
5. In a post-pandemic environment, is there anything in particular [law firm] should be mindful of or any way in which the firm can help you through specific challenges?

 **Questions About the Relationship with [law firm]:**

Thank you. Now I will ask you a series of questions, some quantitative and some qualitative. We would appreciate your being as candid as possible. All your comments, both positive and negative, will be useful to the firm.

**Scaled Questions: Level of Service**

1. Using a scale from 1 to 10, (with 10 being the highest/outstanding and 1 the lowest/poor) how would you rate the service that you receive from [law firm] in the following areas?[[1]](#footnote-1)
* Dedication to your matters and interests
* Knowledge of your business and understanding your goals
* Assessing Risk in a manner consistent with your expectations
* Adaptability during the pandemic
* Responsiveness to needs and requests
* Collaboration on your behalf across the firm’s lawyers and teams
* Collaboration with your own colleagues and team
* Innovative approaches to achieve your goals
* Managing the scope of your project
* Timely communications concerning the work
* Achieving the desired results
1. Using a scale of 1 to 10, how would you rank [law firm] overall in quality of service?

**Quality of the Legal Work**

1. Has the firm’s work been uniformly good/excellent? Have you had any complaints?
2. Were there any differences (positive or negative) in the way the firm worked with you during the pandemic?
3. What do you think makes [law firm] client service more or less superior to what other firms provide?
4. Are there particular lawyers at [law firm] that you regard as your main contacts with the firm? How well are those lawyers performing?
5. Are there other lawyers with whom you work? What is your general assessment of them?
6. What other firms do you use for important [practice-specific] matters?
7. Beyond [practice-specific], what other firms would you consider particularly strong in client service? What might [law firm] lawyers learn from these other firms?

**Client Communications**

1. Do [law firm] lawyers provide you with an optimal flow of information during the course of working together?
2. Did the pandemic impact the information flow (either positively or negatively)?
3. What evolution have you seen in other firms’ communications approach since the onset of the pandemic that [law firm] may be able to learn from?
4. Is there anything other firms do to communicate that particularly impress you?

**Achieving Results**

1. Please provide an example of a positive (or negative) result and experience you had with [law firm].

**Value**

1. How do you assess the value [law firm] delivered? Are there other factors besides the result to determine the value?
2. How do you assess innovation, if at all, when thinking about value? Is the firm innovative?
3. Is there one law firm you use who provides the best value? Do you mind disclosing who? What sets them apart from other firms?
4. What types of client communications from [law firm], not related to a specific work matter, do you – or would you – find valuable? For example: Alerts or Commentaries, Newsletters, Social Media, Podcasts & Videos, Website.

	1. Are there colleagues of yours who might benefit from these kinds of communications?

**Billing & Budget Practices**

1. At the outset of a matter, does [law firm] give you a budget? How successful is the firm at meeting the budget? If the firm needs to vary from the budget plan, do the lawyers reach out to discuss with you before acting?
2. What is your opinion of the firm’s billing practices?

**Competition**

1. What leads you or your organization to hire [law firm] rather than a competitor? Or a competitor rather than [law firm]? How are decisions made?

**General**

1. Are there colleagues of yours that might benefit from an introduction to [law firm]? Given the focused nature of [law firm]’s practice, are there other areas of the business that the firm might be able to serve?
2. Is there anything else you’d like to bring to my attention or mention?

Thank you very much for your time and candor. If you have any additional thoughts, please contact me at yolanda@ppandcconsulting.com.

**Post-Interview Work**

1. Client-Level
	1. Debrief all relevant partners for each client
		1. Provide immediate feedback on any issues or opportunities
		2. Provide written report and lead discussion with all partners relevant to a particular client
	2. Help client teams develop individual response plan
2. Firm-Level
	1. Provide Marketing Committee and Executive Committee with overall report of Themes
		1. Determine whether a Firm-Level response is required on any issues
		2. Determine How to Exploit Firm-Level Opportunities
			1. Business Development
			2. Marketing
			3. Recruiting/Promotions
	2. Provide Recommendations for Phase II program
1. If a particular “hot button” issue arises during the course of this question, I try to get the interviewee to compartmentalize the issue and give me separate scores for the rest of the relationship/experience with the firm. [↑](#footnote-ref-1)