



Client Experience Post-COVID

How law firms leverage ClearlyRated to protect revenue and grow their firm

Kat Kocurek, VP of Marketing at ClearlyRated

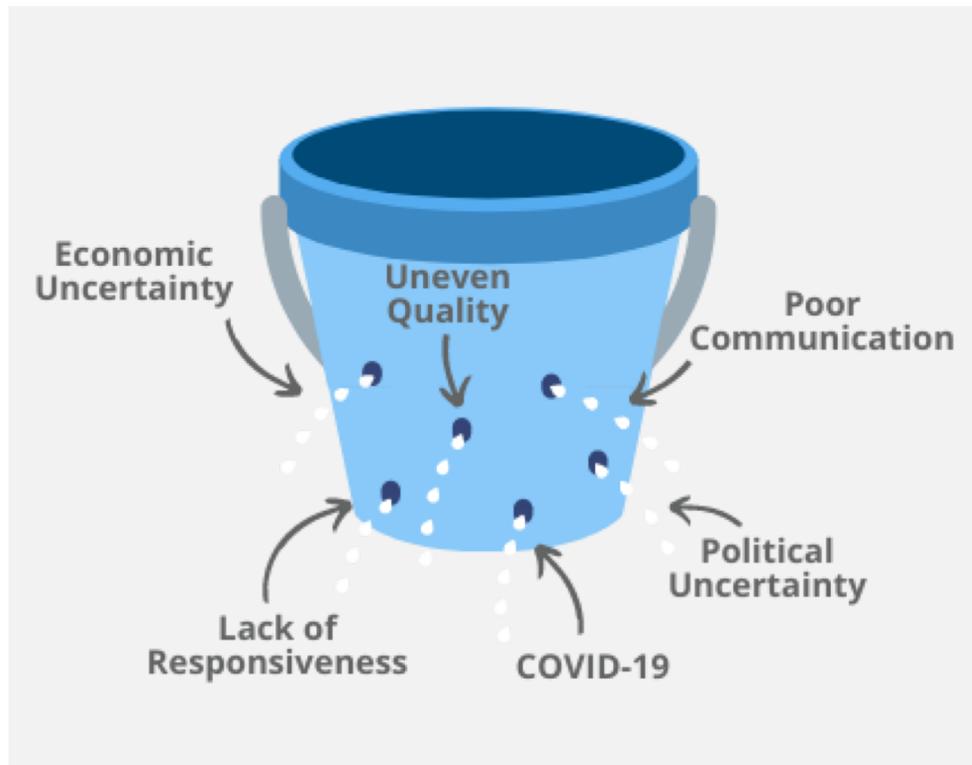
2020 in a nutshell...

WELCOME TO 2020

**IF YOU DON'T ALREADY SUFFER
FROM AN ANXIETY DISORDER,
ONE WILL BE ASSIGNED TO YOU**

@FIT4ARN

Now, more than ever, it's essential to be asking your clients for feedback. Your business depends on it.



About me...



About ClearlyRated



Industry-specific NPS® client survey program
Measure the client experience
Build credible proof of service with testimonials and star ratings
Benchmark firm performance against the industry
Earn an award for service excellence in legal



Diversity, equity, and inclusion-focused NPS® employee survey program
Measure employee satisfaction
Understand perceptions about DEI at your firm
Boost recruiting efforts with employee testimonials
Earn an award for exceptional employee satisfaction

Over the next hour, we'll discuss:



Why asking clients and employees for feedback is critical in these unprecedented times.



The financial implications of the client experience, and how it drives revenue.



The current state of the legal client experience.



What a systematic client feedback initiative can / should look like.



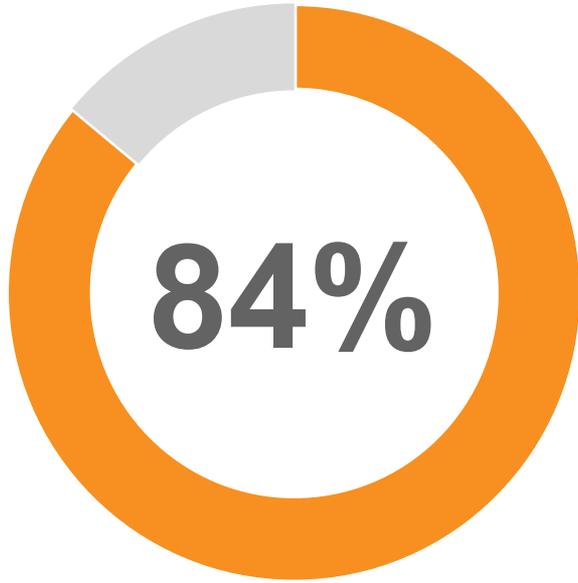
Best practices for NPS and common missteps to avoid.



COVID-19: The case for asking clients for feedback *now*

Client churn is likely to increase, even as the economic climate improves.

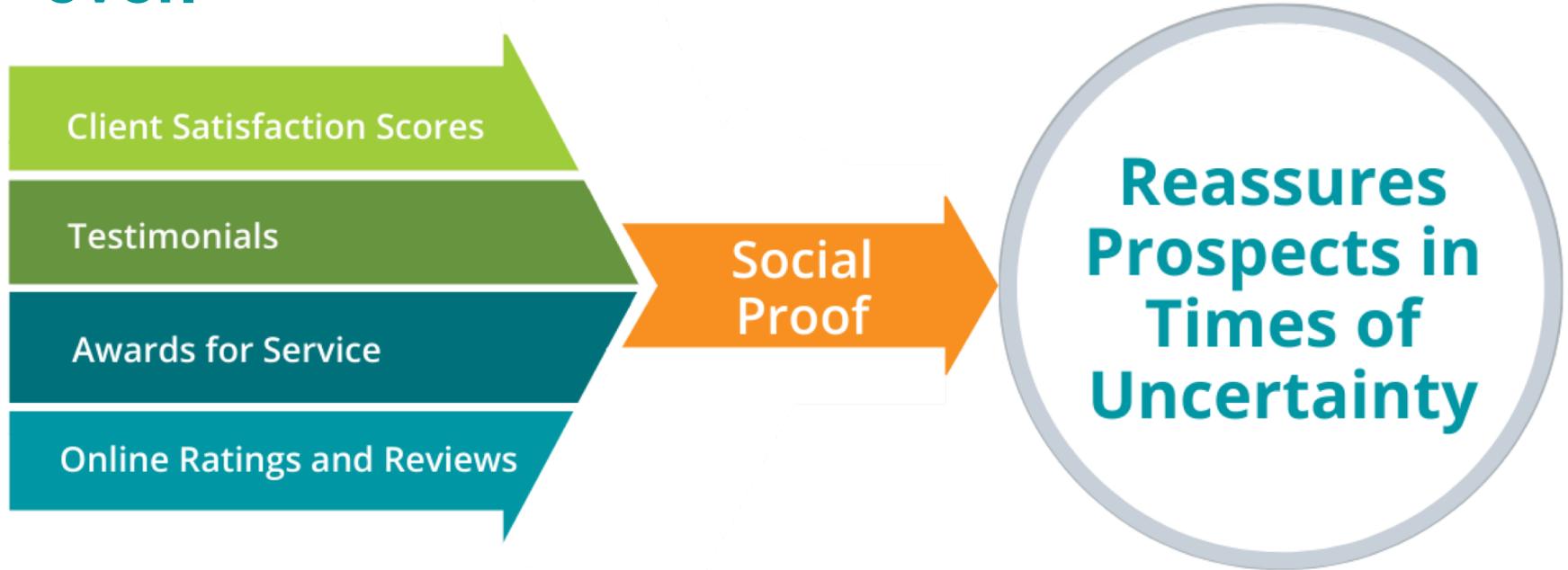
If you've weathered the first wave of client churn or contraction of work, the last thing you need to deal with is the preventable churn that's driven by service-related dissatisfaction.



84% of professional service firms that work with ClearlyRated have identified one or more at-risk clients through their survey program... and that is before COVID flipped our economy on its head.

SOURCE: ClearlyRated 2020

Economic uncertainty drives risk-aversion, making social proof more important than ever.



Your team deserves some good news to celebrate.

“

"The ClearlyRated survey process is so easy, and the results are well worth the price. While it is a nice differentiator for us, it is also a massive morale boost to our employees during our busiest time of year."

- Jennifer Cantero

Director of Marketing & Sustainability
at Sensiba San Filippo LLP

Emilie has been more than great throughout the entire process. She has been thorough about what steps to take and has helped me with

Lauren is the absolute best and is always available to assist with our request! She's patient, and truly treats us like a valued client. Thanks for everything Lauren!

Always responsive; always human; genuinely interested in our experience with ClearlyRated.

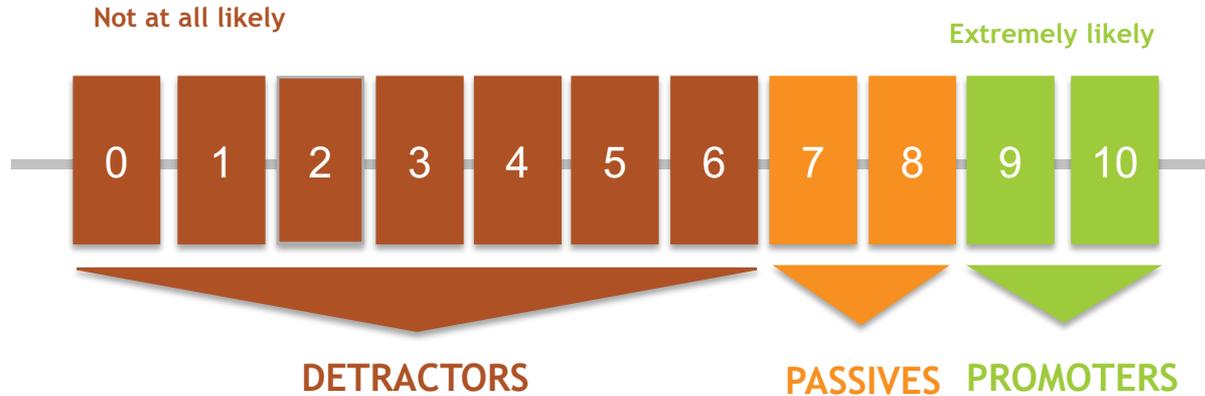
**Now is also a critical time to be asking
for feedback from your employees**

The case for asking employees for feedback now:

1. The members of your internal team are the lifeblood of your clients' experiences.
2. Employee turnover represents a huge expense to your business.
3. Unexpectedly losing a key employee, especially one who services clients, creates outsized disruption in uncertain times.
4. An employee satisfaction survey can, and should, help your firm understand how every member of your staff perceives their own safety, inclusion, and worth in light of stated company goals and unspoken company culture.

Measure the Client and Employee Experience with Net Promoter® Score

How likely are you to recommend our firm to a friend or colleague?



$$\text{Net Promoter® Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

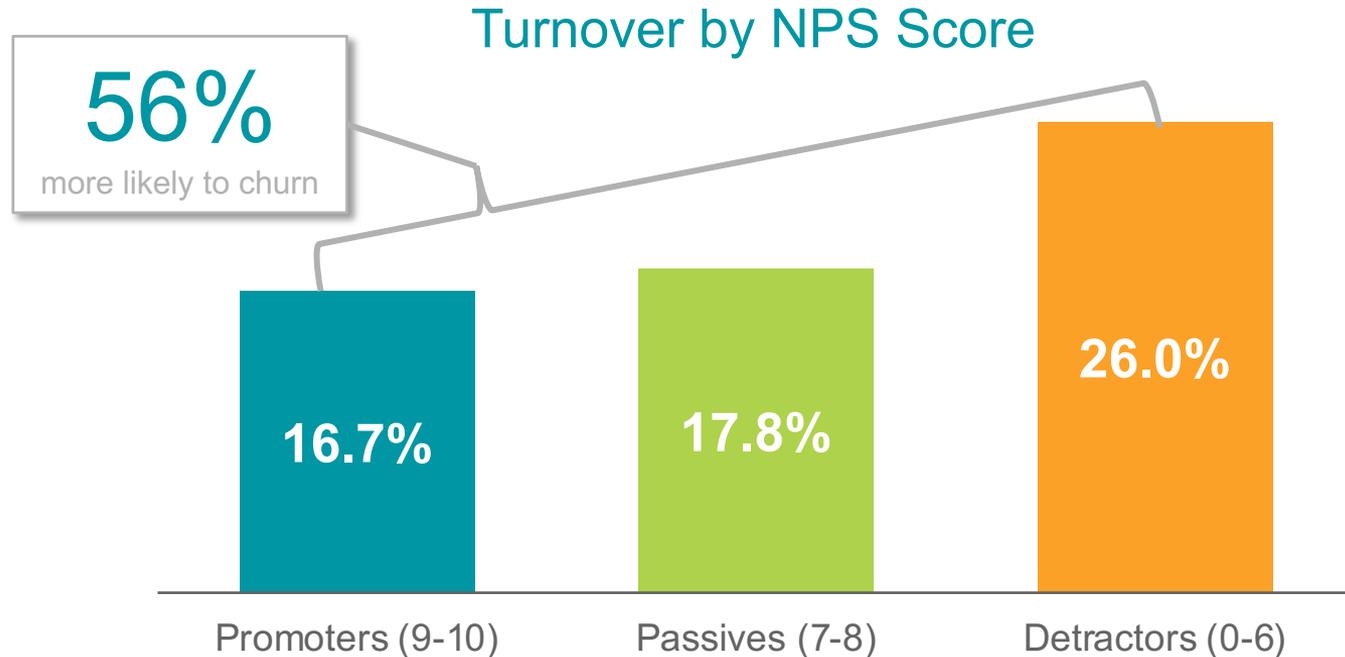


"Net Promoter, Net Promoter System, Net Promoter Score, NPS and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc."

A photograph of two women in a professional setting, possibly a meeting or office. The woman on the left is looking down thoughtfully, while the woman on the right is looking at a laptop screen. The image is overlaid with a semi-transparent green filter.

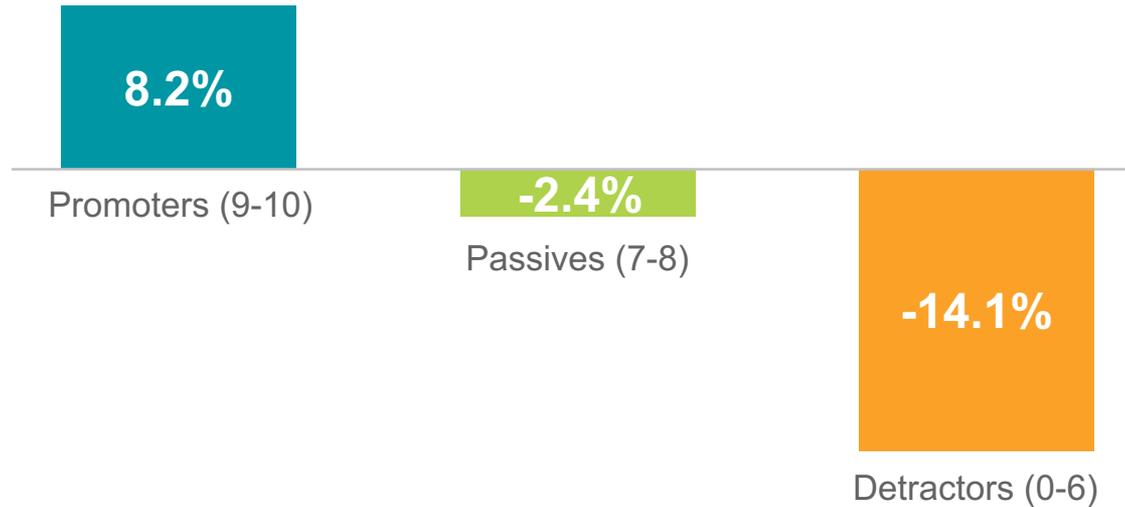
Financial Impact: How the client experience influences revenue

NPS is a predictor of client churn



But even Detractors who don't leave spend less next year.

Change in Following Year's Spend



Promoters are highly valuable.

Compared to Detractors, Promoters of their primary law firm are...

More committed to only using their current primary law firm

46%

more likely to be fully committed

Less likely to plan a decrease in annual spend with their primary law firm

3.2x

less likely to decrease spend

More likely to provide a testimonial for their primary law firm

13x

"very likely" to provide a testimonial

More likely to share an online, public review for their primary law firm, if asked

62%

more likely to provide an online review

SOURCE: ClearlyRated 2019

It's hard to differentiate on service without proof



**Baker
McKenzie.**

“Helping clients overcome the challenges of competing in the global economy through a new type of thinking and a different mindset.”



“We strive to be the leading global business law firm by delivering quality and value to our clients.”

Morgan Lewis

“At Morgan Lewis, we see our clients as partners. ... we’re always responsive and always on.”



“While other law firms are focused on their growth and expansion across the United States or globally, we are focused on our clients’ success from our sole office in Century City.”

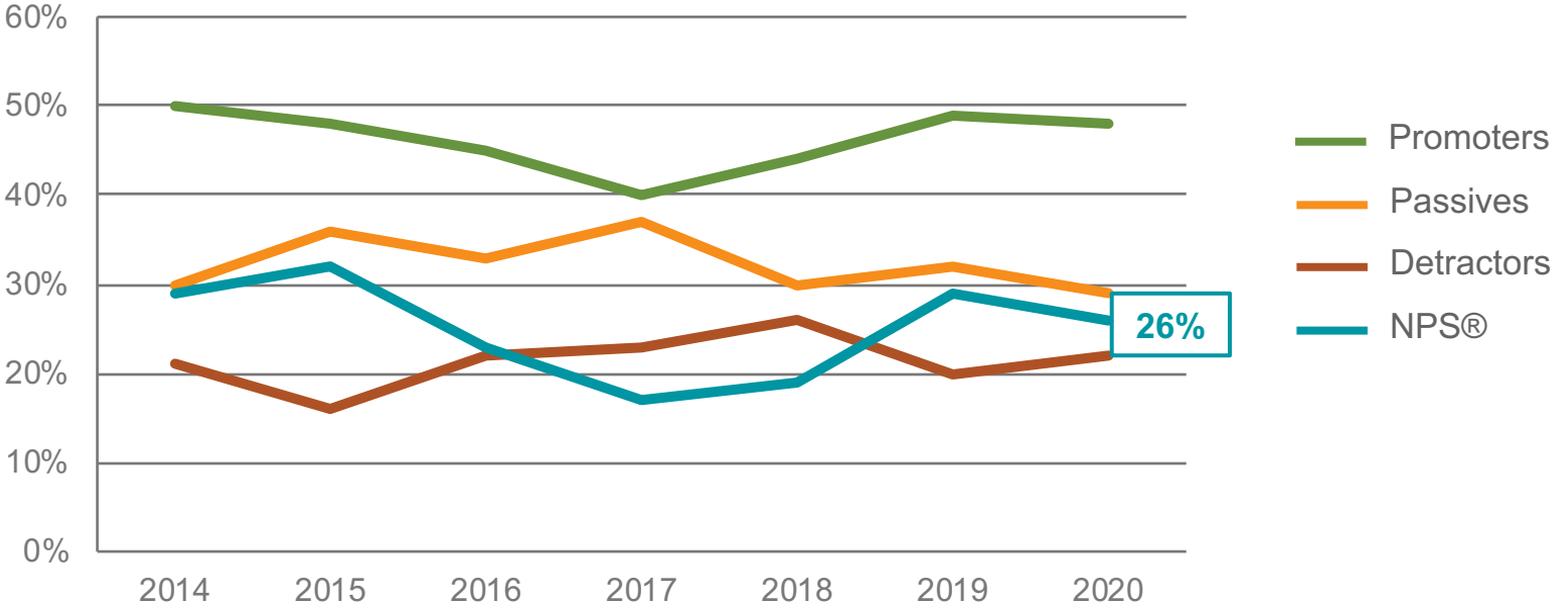
WHITE & CASE

“White & Case is a truly global law firm, uniquely positioned to help our clients achieve their ambitions in today's G20 world.”



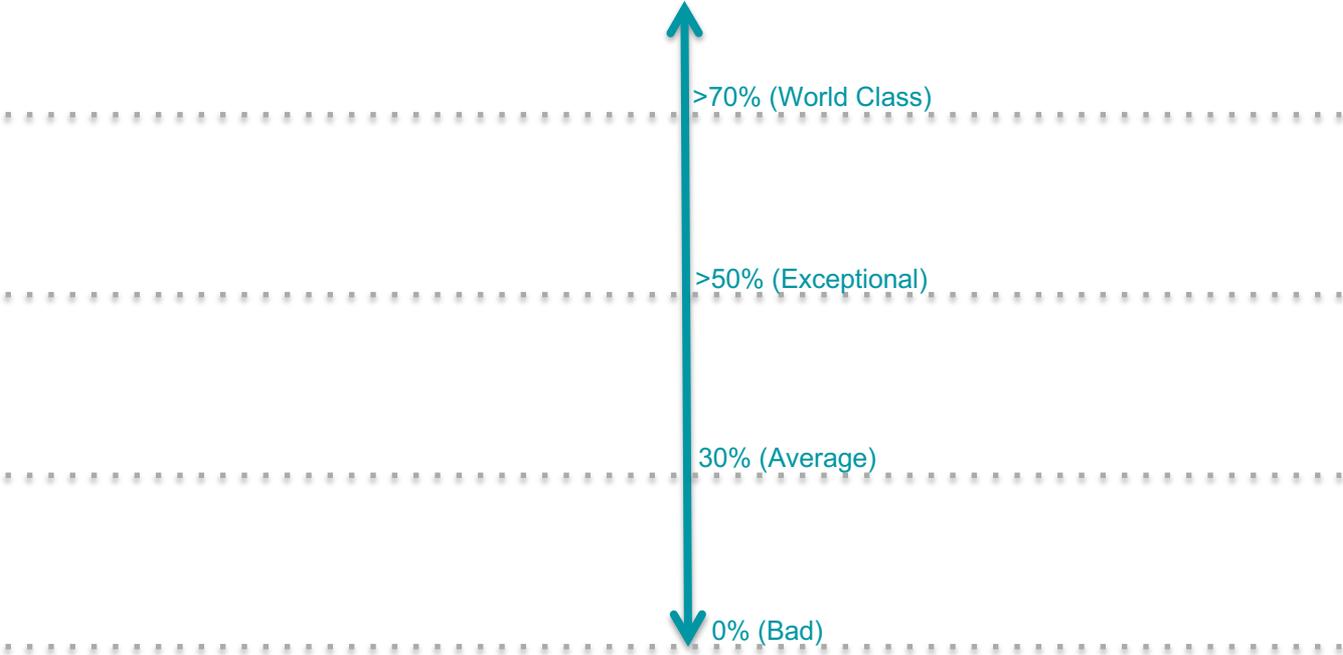
Current State of the Legal Client Experience

Legal Industry NPS® Benchmark

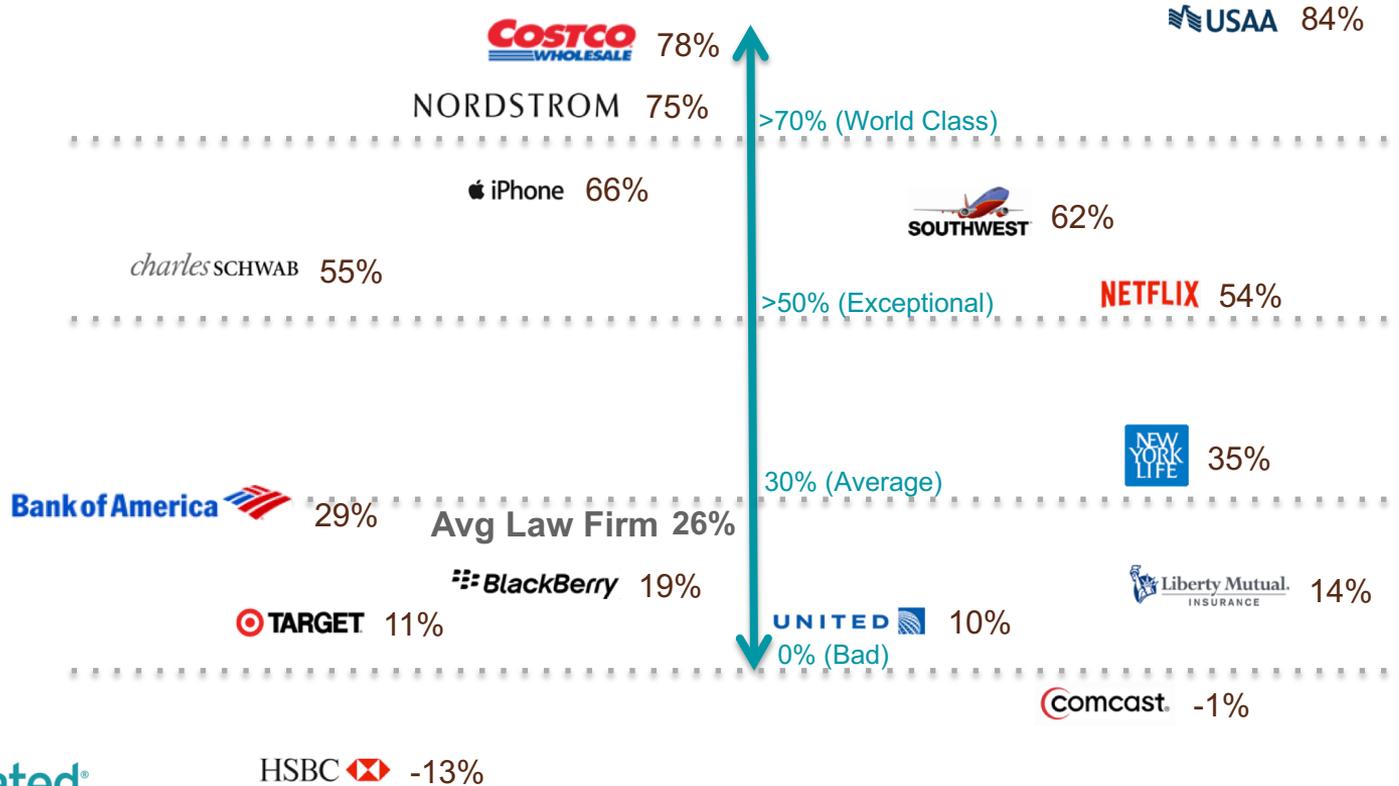


SOURCE: ClearlyRated 2020

Global NPS Standards



NPS Across Industries



NPS Drivers



= % impact on NPS when "Always"

The firm [always / sometimes / never] proactive in their approach to helping me.



The firm [always/sometimes/never] has a thorough understanding of my needs.



The firm [always/sometimes/never] delivers high quality, error-free work.



Contacts at the firm [always/sometimes/never] return my phone calls and emails within 24 hours.



The firm [always/sometimes/never] delivers within the timeframe they say they will.



8-Question Survey



Satisfaction Survey

Based on your most recent experience, how likely is it that you would recommend Your Brand to a friend or colleague?

Not at all likely Extremely likely

0 1 2 3 4 5 6 7 8 9 10 Don't Know

My phone calls and emails are _____ returned within 24 hours.

- Always
- Sometimes
- Never

Your Brand _____ delivers high quality, error-free work.

- Always
- Sometimes
- Never

The firm's services are _____ a good value, given the cost.

- Always
- Sometimes
- Never

Your Brand _____ has a thorough understanding of my needs.

- Always
- Sometimes
- Never

Your Brand is _____ proactive in their approach to helping me.

- Always
- Sometimes
- Never

What is the primary reason behind the rating you provided?

What is one thing we could be doing differently to increase the value you receive from us?

Net Promoter Score (NPS) question

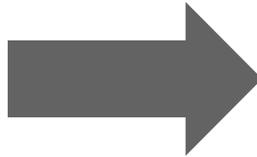
NPS Driver Questions



Best Practices in Client Experience and NPS Design

Best Practice #1: View NPS as a tool for firm growth

- From report card to basis for growth



Best Practice #2: Build a process to support action

- It may be that your process isn't the problem (or the solution), chances are your execution is.

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- It may be that your process isn't the problem (or the solution), chances are your execution is.
- **Commit to taking action on feedback in real time.**

Best Practice #2: Build a process to support action

Contact Information
and Respondent
Details

NPS, Comments &
Loyalty Driver
Answers

New Detractor Response!

Jane Nixon No Change

Brand: XYZ Networks
Branch: Seattle

Reporting Units: Account Manager: Jim Halpert
Recruiter: Darryl Phibbin
Company: Pan Am

Email: jane.nixon@demoemail.com

Phone: 261-045-4208

Company: Pan Am

Tags: None

Survey Type: End of Assignment

Based on your most recent experience, how likely is it that you would recommend XYZ Networks to a friend or colleague?
3

What is the primary reason behind the rating you provided?
I was completely disregarded at the end of my assignment and couldn't get anyone to call me back, even though we had a great working relationship throughout the past 6 months.

What is one thing we could be doing differently to increase the value of our services to you?
Treat your people better. I will tell everyone not to use you!

XYZ Networks typically responds to any issues or questions I have within 24 hours.
No

Prior to the end of my assignment, someone at XYZ Networks reached out to discuss other opportunities.
No

XYZ Networks communicated well with me throughout the course of my assignment.
Yes

I received performance feedback from XYZ Networks throughout the course of my assignment.
Yes

Choose a resolution after following up:

[Resolution in Progress](#) | [Can't Resolve](#) | [Not an Issue](#) | [Resolved](#) | [Escalate](#)

SET ISSUE STATUS
Resolution In Progress

ASSIGN ISSUE
 Select a user

ADD ISSUE FOLLOWERS (RECEIVE EMAIL UPDATES)
 x

Type in some notes... (required)

Status updated by Eric Gregg

[Update Issue](#)

Best Practice #2: Build a process to support action

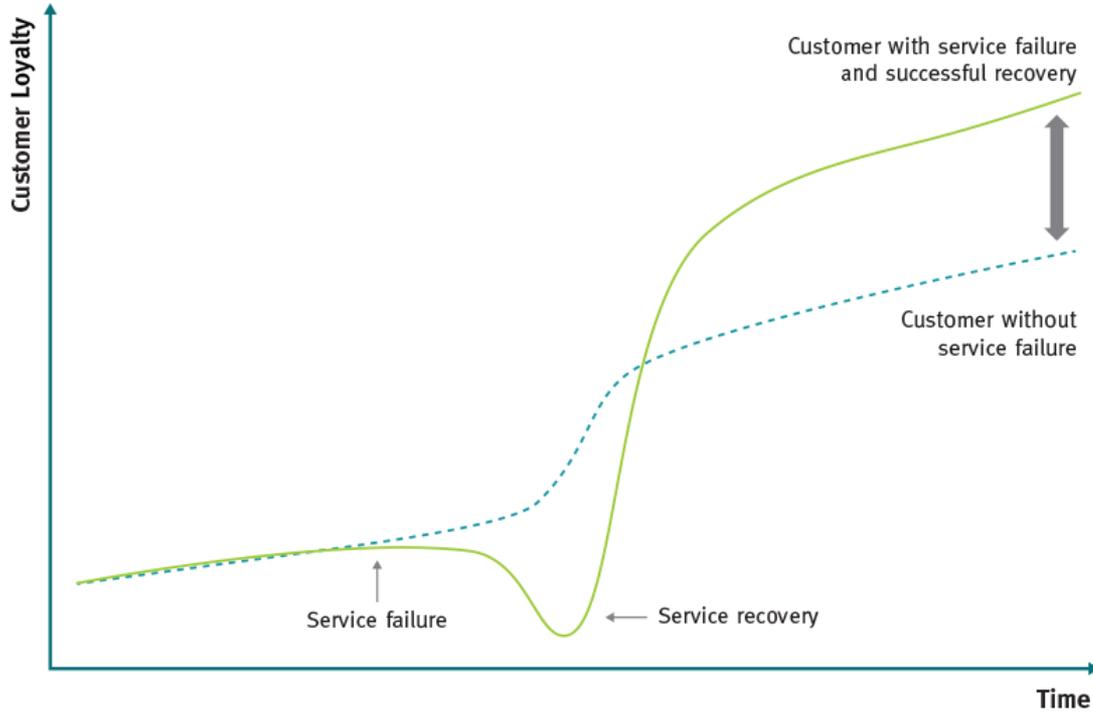
- It may be that your process isn't the problem (or the solution), chances are your execution is.
- Commit to taking action on feedback in real time.
- **Have a triage plan in place.**

Best Practice #2: Build a process to support action

The right solution only matters if it happens in time to make a difference.

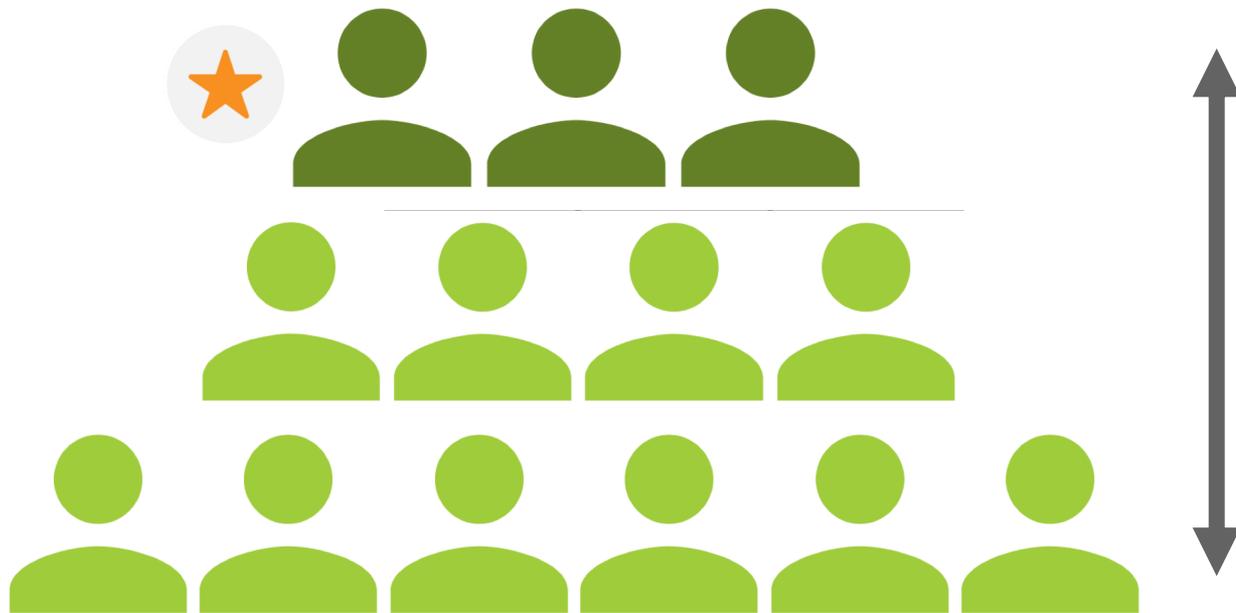


The Service Recovery Paradox



Best Practice #3: Lead from the top, but engage throughout the organization

- Partner-level buy in and leadership is critical
- Celebrate service wins at all levels



Best Practice #4: Analyze with intelligence

“What Happened”

“What is Happening”

The New York Times
LATE EDITION
VOL. CLXXIX No. 58,733 NEW YORK, TUESDAY, JUNE 23, 2020 \$3.00

Trump to Halt Worker Visas Through 2020

Tech, Child Care, Even Medical Jobs in Peril

CLUSTERS POP UP IN NEW LOCATIONS AS STATES REOPEN

BARS AND CHURCHES HIT Virus Cases' Resurgence Signals a Risky Phase and Long Struggle

Forget About Coffee and Doughnuts

Flip Arizona? Biden Backers See a Chance

Pandemic Pushes New Yorkers Into Legal Limbo

Amid City's Lockdown a Backlog of Pending Cases Exploded

VS



Breaking News: The New York City Marathon, the world's largest, has been canceled this year amid concerns about the spread of the coronavirus

7:03 AM · Jun 24, 2020 · [SocialFlow](#)

572 Retweets 928 Likes



Best Practice #4: Analyze with intelligence

Relational Survey Strategy

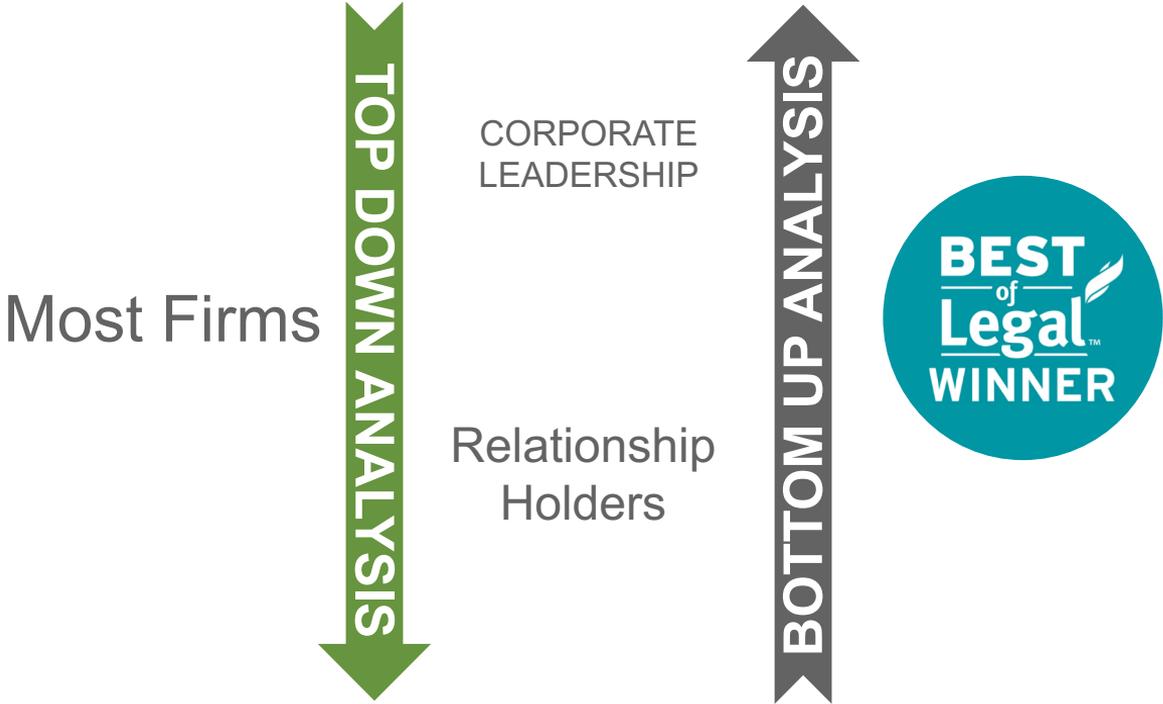
- Measures the client experience on an overall / longer-term basis
- Allows for annual or semi-annual checkpoints and feedback
- Answers the question: “What Happened?”

VS

Transactional Survey Strategy

- Measures client satisfaction at critical points in their experience with your firm (i.e. during onboarding, end of engagement, post-tax season, at billing, etc.)
- Empowers decision-making and improvement with real-time feedback on a rolling basis
- Answers the question: “What is Happening?”

Best Practice #4: Analyze with intelligence



Best Practice #4: Analyze with intelligence



Lisa Simon

Chief Marketing & Business
Development Officer

Lewis Roca Rothgerber Christie

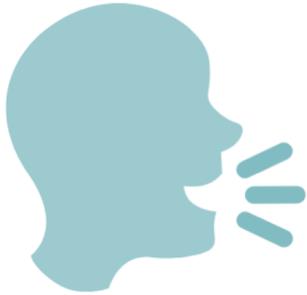
“

Getting an NPS score itself was helpful but I didn't anticipate getting behind that number and understanding the day-to-day activities that our attorneys could engage in to drive that score higher and create better relationships with our clients.

”

- Lisa Simon

Best Practice #4: Analyze with intelligence

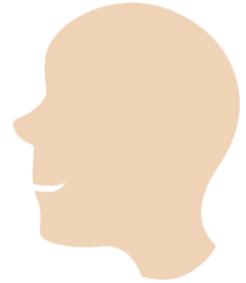


“Give me an update every week, please”

POLICY:
Updates every 2
weeks



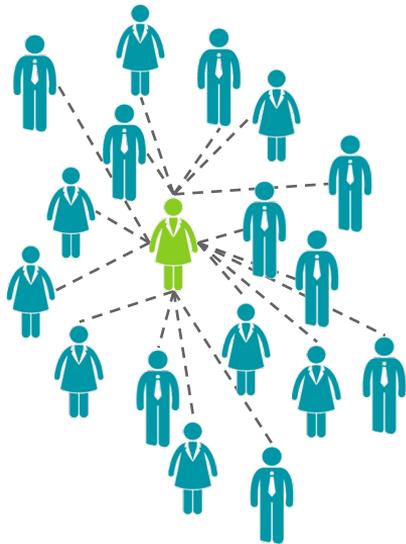
NOBODY IS HAPPY



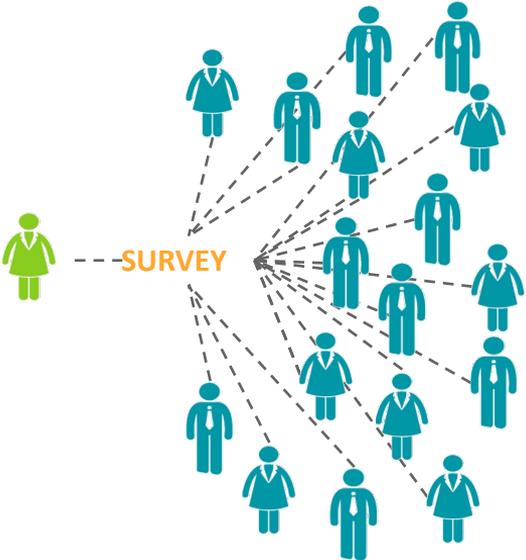
“Weekly updates are annoying, just update me once a month.”

Best Practice #5: Leverage technology to scale ROI

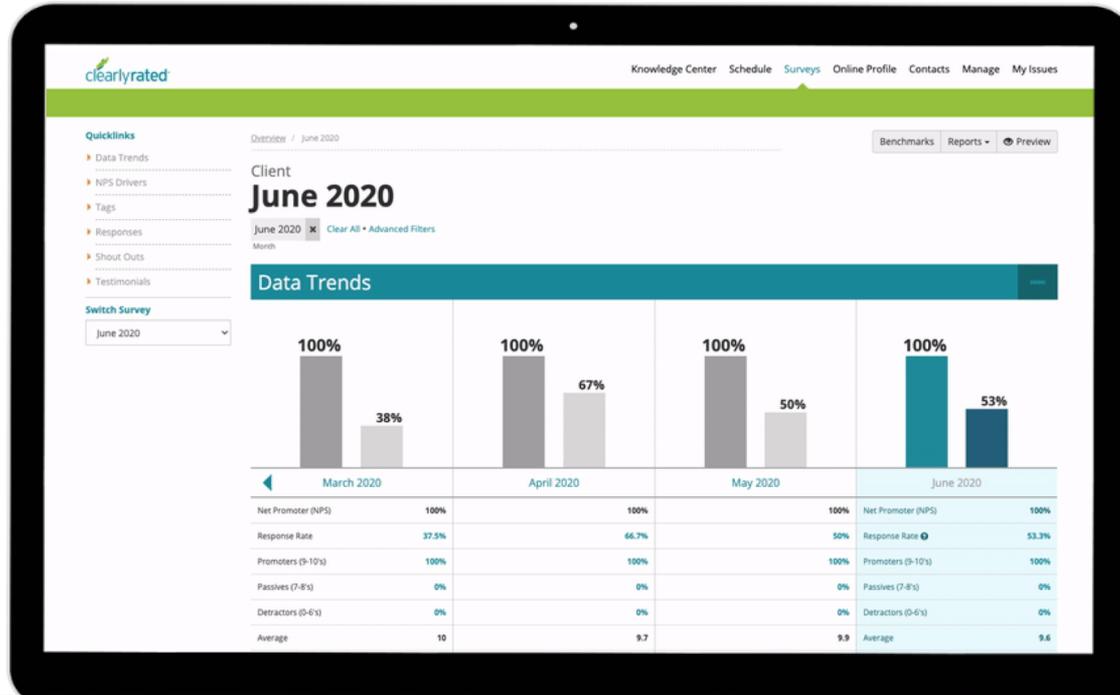
Fragmented
Doesn't Scale



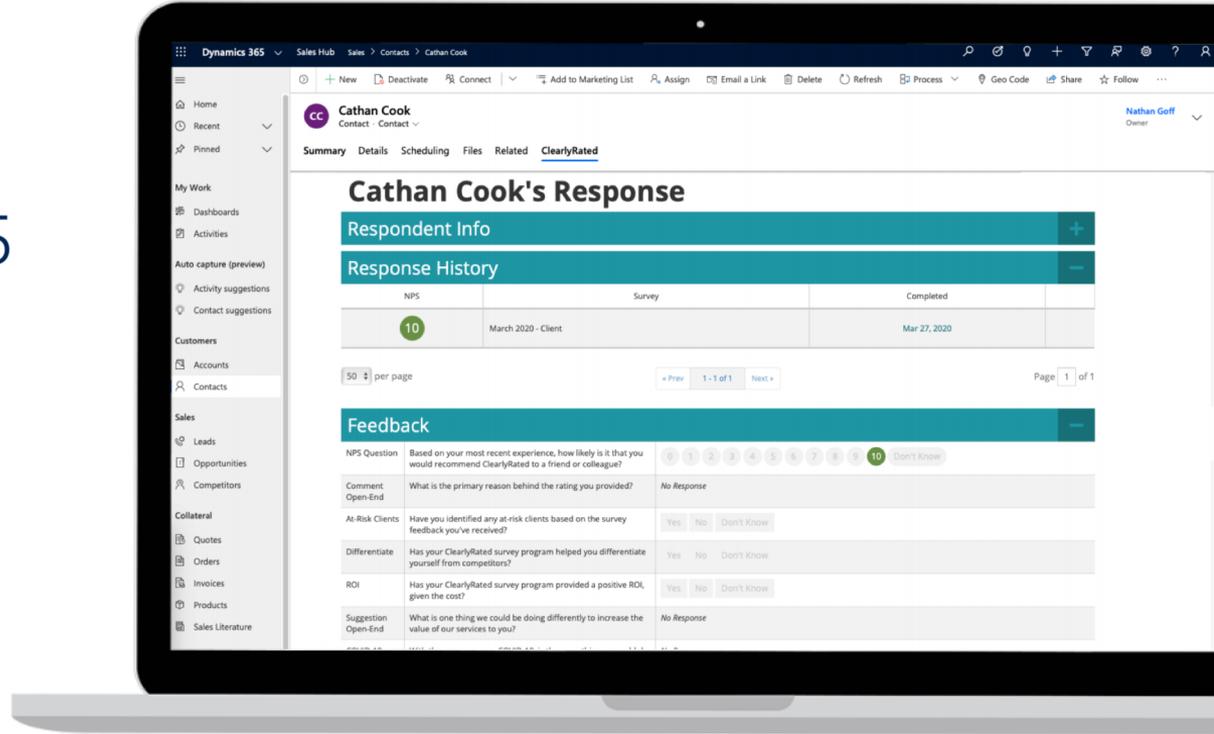
Efficient
Scalable



Best Practice #5: Leverage technology to scale ROI



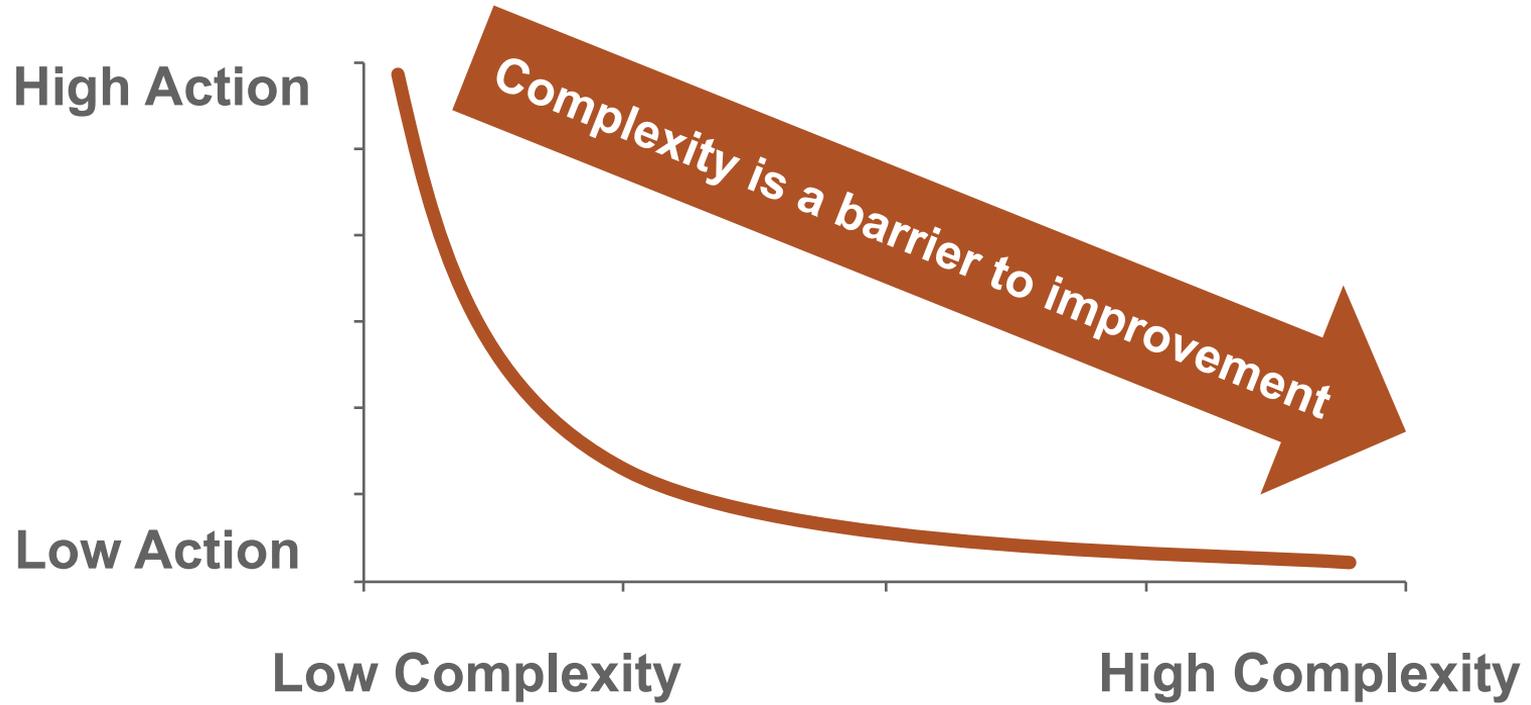
Best Practice #5: Leverage technology to scale ROI





Common Missteps to Avoid

Misstep #1: Overcomplicating the initiative



Misstep #1: Overcomplicating the initiative

80



80% of your time should be spent responding to and taking action on feedback.



20



20% of your time should be spent on designing and implementing a survey.

Example survey:

Ask the questions that will be most valuable and actionable to your team.



Mostly multiple choice

Satisfaction Survey

Based on your most recent experience, how likely is it that you would recommend Your Brand to a friend or colleague?

Not at all likely Extremely likely

0 1 2 3 4 5 6 7 8 9 10 Don't Know

My phone calls and emails are _____ returned within 24 hours.

- Always
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- Never

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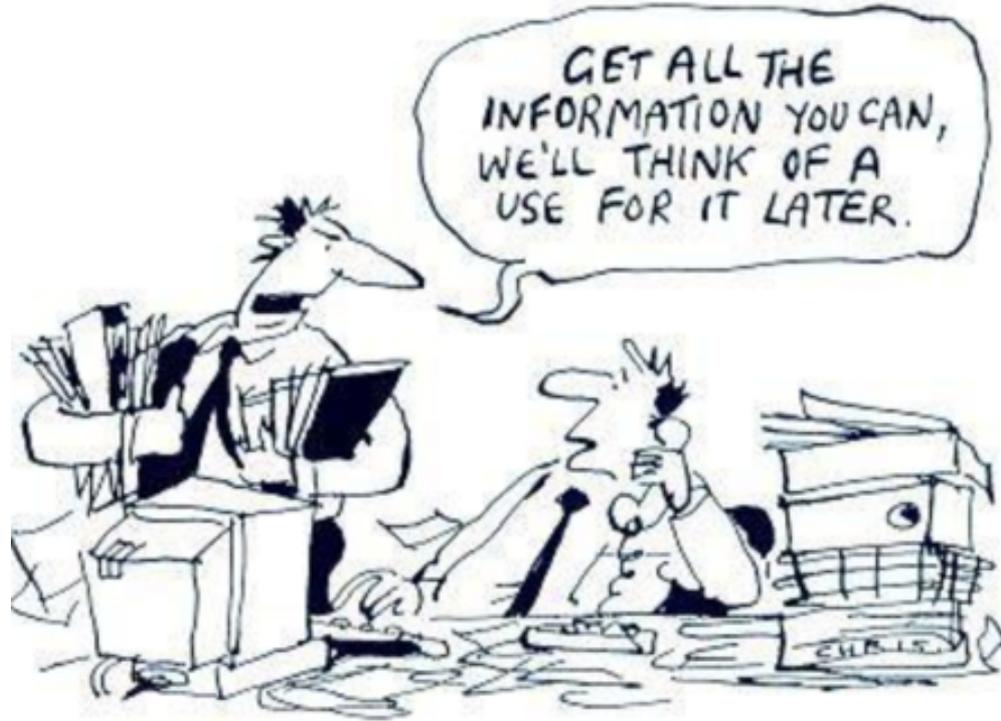
- Always
- Sometimes
- Never

What is the primary reason behind the rating you provided?

What is one thing we could be doing differently to increase the value you receive from us?

No more than 10 questions

Misstep #1: Overcomplicating the initiative



“In order to truly invest in our Experience Amplifies initiative, we needed a way to measure the impact of our behavior. I knew that NPS was a powerful way to accomplish that goal.”



– Lisa Simon

Chief Marketing and Business
Development Officer

Lewis Roca Rothgerber Christie

“We were ready to authentically measure our ability to meaningfully connect with and grow relationships with our clients, and the ClearlyRated platform helped make that possible.”



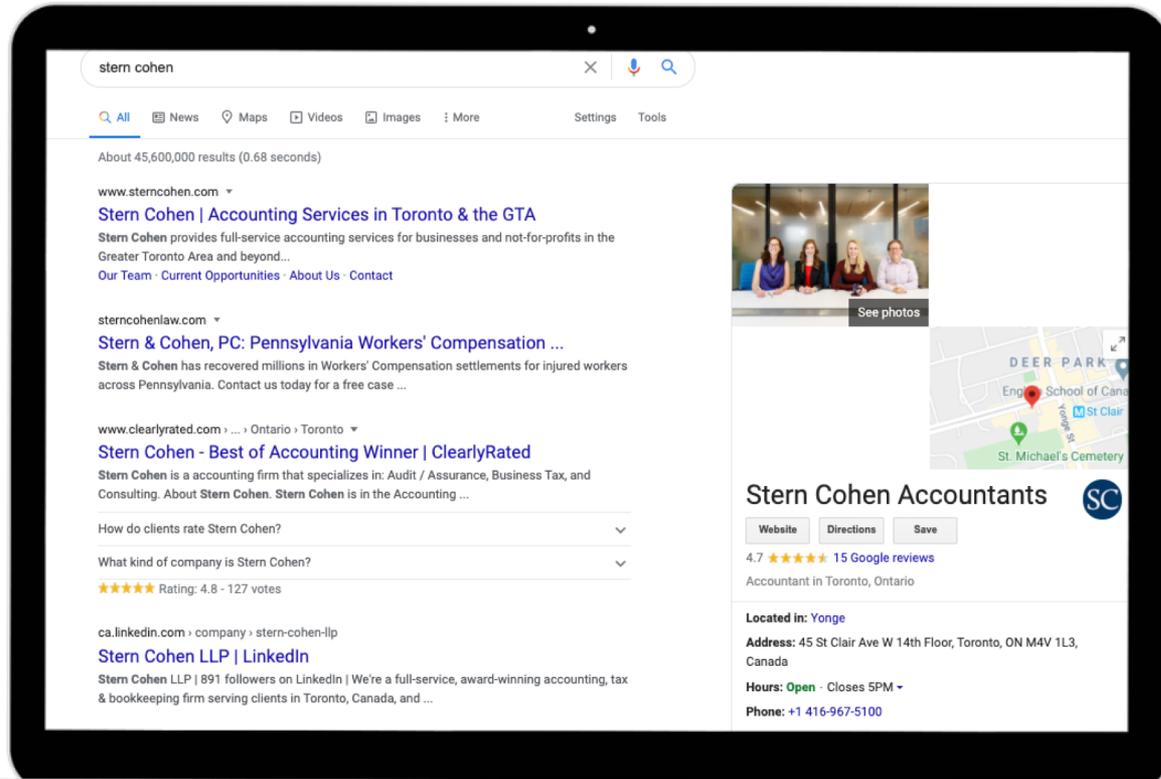
– Dave Sullivan
Shareholder & Director of
Business Development
Perkins & Co

Misstep #2: Settling for a low response rate

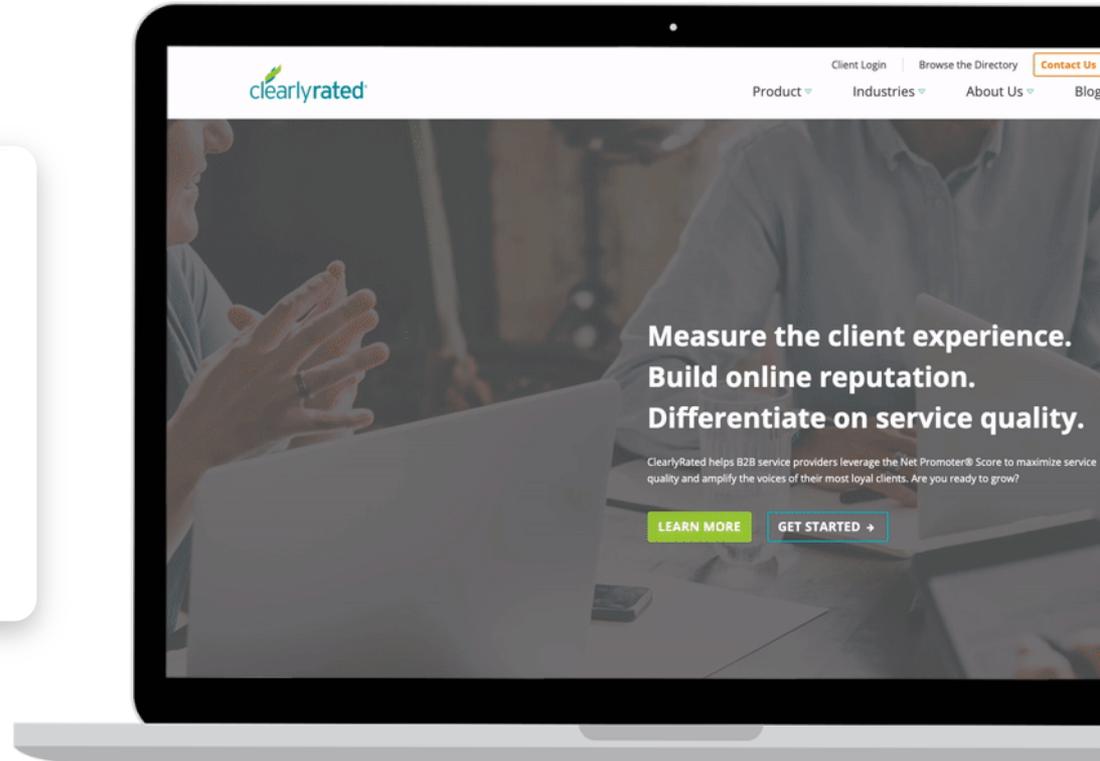
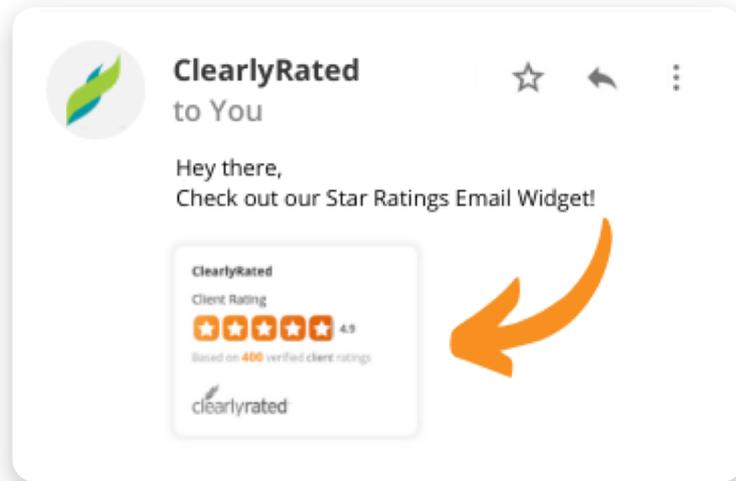
- Ways to increase your response rate:
 1. Personalized email
 2. Lose the HTML
 3. Email signed by individual
 4. Embedded NPS question
 5. Strong server rating
 6. Mobile-optimized (and easy)
 7. # of questions in subject line
 8. Communicate early & often
 9. Close the loop
 10. Push for internal follow-up
 11. (at least) 1 reminder email



Misstep #3: Not capitalizing on positive feedback – Online Reputation

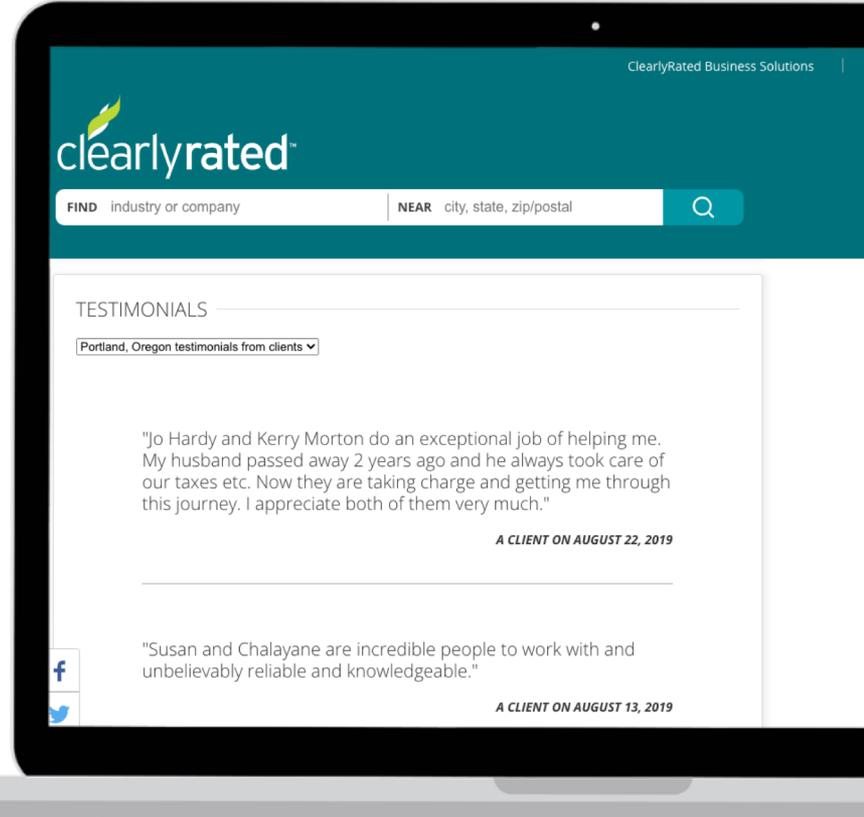
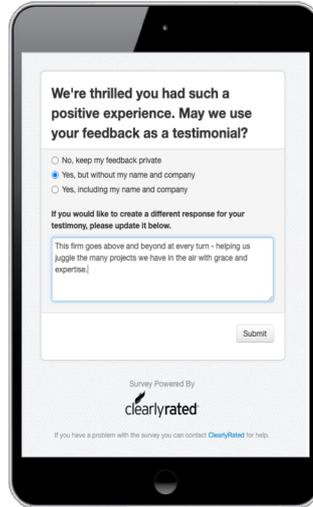


Misstep #3: Not capitalizing on positive feedback – Embedded Client Ratings



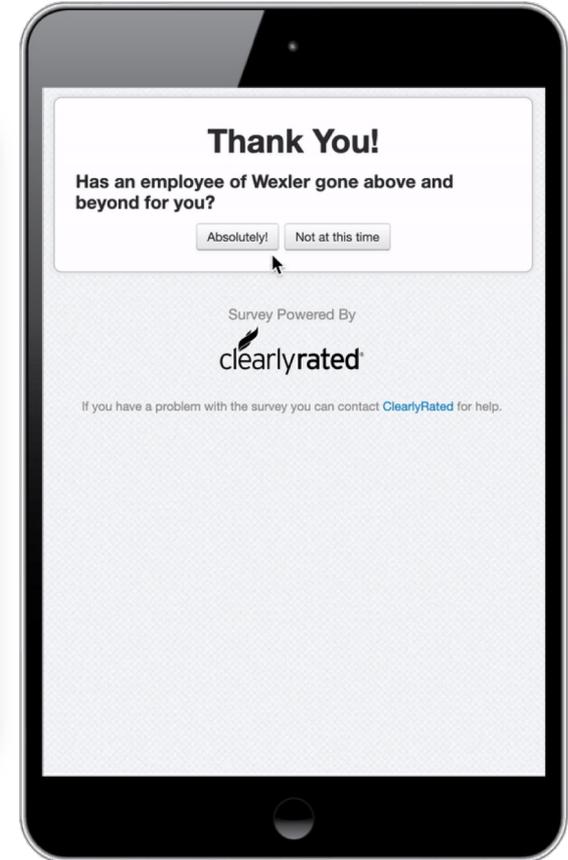
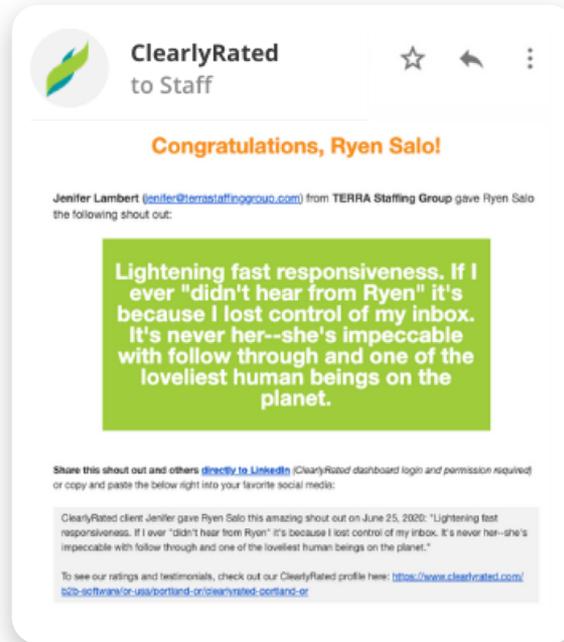
Misstep #3: Not capitalizing on positive feedback – Testimonials

The average professional service firm who surveys their clients with ClearlyRated generates nearly **200** client-approved testimonials



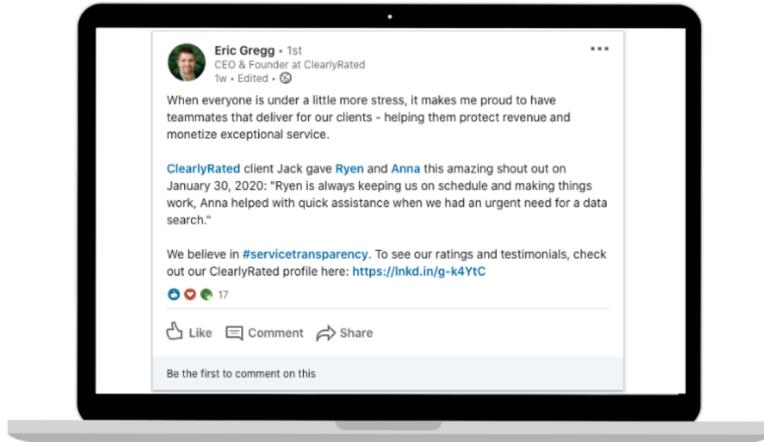
Misstep #3: Not capitalizing on positive feedback – Shout Outs

On average, roughly **40%** of Promoters will elect to leave a Shout Out



Misstep #3: Not capitalizing on positive feedback – Social Sharing

LinkedIn



facebook



Comments from marketing and BD leaders about the power of positive feedback:



Jack M. Kolmansberger
Chief Marketing Officer
Herbein + Co

“Our ability to share positive client feedback internally helps us to culturally reinforce our commitment to client service while providing clear examples of the types of behaviors that create a world-class client experience. It’s one of the many ways that we’re leveraging our NPS survey program for continuous improvement. We want to be the firm that’s looking ahead, not backward.”

– Jack Kolmansberger

Comments from marketing and BD leaders about the power of positive feedback:



Dave Sullivan
Shareholder & Director of
Business Development
Perkins & Co

“Hearing from our happy clients and seeing glowing feedback from key accounts was an incredibly powerful experience! We have learned how to harness this positive feedback as a touchstone to rally our team around our commitment to the client experience and to reinforce our culture of service excellence throughout the firm.”

– Dave Sullivan

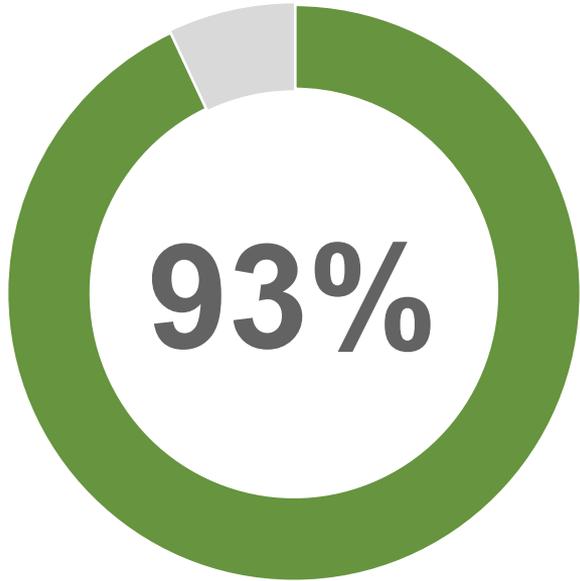
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Jennifer Centro
Director of Marketing &
Sustainability
Sensiba San Filippo

“*The ClearlyRated survey process is so easy, and the results are well worth the price. While it is a nice differentiator for us, it is also a massive morale boost to our employees during our busiest time of year.*”

– Jennifer Cantero



93% of professional service firms that work with ClearlyRated say their ClearlyRated survey program helps them differentiate in the marketplace.

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clearlyrated®



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“White & Case is a truly global law firm, uniquely positioned to help our clients achieve their ambitions in today's G20 world.”

Parting Thought

More legacies will be defined in 2020 than in the past decade combined.

BE A HERO

Questions?



Kat Kocurek

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