

SURVEYING CLIENTS AND STRIKING GOLD

By Victoria L. Herring

A lawyer friend of mine and I were talking recently about the problem of keeping clients up-to-date without a lot of extra effort and expense. Not that the clients don't deserve these efforts, but it takes quite a bit of lawyer and staff time to keep each client abreast of events in the case as they happen and in general on topics relevant to the case.

Many years ago, I read Jay Foonberg's *How to Start and Build a Law Practice*, as well as other sources on how to open a solo practice, and as a result, one thing I try to do is send communicative monthly billing. These billing statements not only provide a complete notation of the work done in detailed notes (also with an eye to a later attorney fee application), but also include a note or comment on each bill. That is fairly easy to do and quick in my Billings application on my Mac, and I find that it is a great help in lowering the natural angst of my clients.

Now, after more than 30 years and many advances in technology, such communications can be improved through the use of various applications. Most clients, but certainly not all, do have some form of Internet access and are used to this form of communication. (You do want to observe ethics rules and good privacy practices if you communicate with clients through the Internet in any manner, of course.) So we were wondering how we could use our Macs and iOS devices to participate in productive, automatic client communication. I did some research on the issue and I can report to you that there are several methods for attorneys using Macs or iOS

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devices to keep clients informed and to be responsive to their inquiries.

The basic idea is to keep a positive relationship with clients and to help them understand what is going on with their case. Lawyers who do not communicate with their clients generally have issues develop unnecessarily with their cases—and may even face an ethics inquiry. Therefore, not only is communication good for the client, it's also good for the lawyer.

COMMUNICATING THROUGH QUESTIONNAIRES

When I researched the topic, I learned you could do this extremely expensively with all the bells and whistles, or you could adapt another concept into a useful means of law office communication.

For instance, those in marketing know that there are a number of instruments and websites on the Internet that can be used to send feedback surveys to a person or group. These methods solicit views, pull together the data, and create a

report. If it is designed correctly, a survey also can be used in a more personal and professional manner with your clients.

Of course, the whole concept behind automation of this inquiry process is to make it relatively inexpensive and easier to do—not only to gather and understand information, but to seek it. One caution I do have is to stick to the “KISS” principle (“keep it simple, stupid”). Many clients are not adept at electronic communication and lack the resources to become so. And, frankly, many people cannot handle complicated communication. So, whatever you do, make the survey or questionnaire short, succinct, and with simple, easy-to-understand verbiage. What you're trying to do is engage in a two-way discussion with your client and to build the bonds of a meaningful, trusting relationship. To do this, clients must want to respond, must respond promptly and usefully, and must feel good about making the response.

The mechanics of this concept are

easy. Even before you create the questionnaire, you will want to create an *automatic* method for it to be generated and sent. In Mac OS X, you could choose the scripting process called AppleScript, the Automator workflow application (macosxautomation.com/automator), QuicKeys by Startly (startly.com), or many others. You can set an action to be triggered by a date or event without your having to direct it. Obviously, the creation of such a workflow must be done carefully so you can trust that it is done well and that your system won't run off the rails.

CREATING AND ANALYZING YOUR QUESTIONNAIRE

The first question, of course, is what do you want to know? Do you mainly want to update file information (phone, e-mail, family data) on a regular basis without a lot of hassle for either of you, or do you want something more substantive, a dialogue? Of course, you can develop both. After you have determined your goal, draft questions you want to ask or information you wish to share.

You want to set up the process so that the e-mail or other message to clients will be easy for them to handle—and for you to process when they respond. If you have a staff, you will want to set up the replies to come back to them, *not* to you. If you are doing this yourself, create a separate mailbox or file folder to hold responses, bounce-backs, and other items related to your questionnaire as they go out and come in. You also want to be able to provide a written form so that non-tech savvy clients can fill out the information and return it.

Once the information comes back to your office, it needs to be analyzed. This is easy to do if you use an Internet- or application-based electronic method and

relatively few essay-type answers. You should encourage clients to respond with commentary and essays, if need be, but most won't want or need to if you structure the questionnaire well.

CHOOSING THE RIGHT APP

Now, what automation methods are there for a Mac or iOS device to conduct surveys or questionnaires with clients to reach these goals? I have found a few options through searching the Mac OS and iOS app stores and will provide them. More detailed information on how they work, and other criteria, can be found on technological, Macintosh, or the developer website. The specifics of each product are beyond this commentary.

One option is the Internet-based questionnaire-creator SurveyMonkey (surveymonkey.com). The SurveyMonkey website and product can be used free of charge. Countless users have become comfortable with how the system works; it is an easy way to start the process or to test how it will work with your office.

For the Mac OS X, I did find one affordable application that is very similar to SurveyMonkey but that might provide more control and creativity in forming the questionnaire: Touch Forms Pro (touchforms.aidaluu.com). It can be purchased on its website for about \$10. It is a stand-alone, rather than web-based, application, and this might be preferable. Given time constraints I wasn't able to do a thorough test by creating and using a questionnaire form for feedback. But I'll do so and report back in a future article or on my blog.

In addition to this application for the Mac, there are three I found for iOS devices on the App Store (itunes.apple.com). Each has positive aspects and might be worth trying. The first of these is QuickTapSurvey by TabbleDabble Inc.

(quicktapsurvey.com), which is free. The second is Survey Maker by SurveyCrest (surveycrest.com); this app is not free, but as with most iOS apps, it does not cost so much as to stop you from trying it. The third is the iOS version of SurveyMonkey.

Both QuickTapSurvey and Survey Maker require an Internet account where your questionnaires and responses will be stored. Basically, you create the survey and send it out, and as people respond, you are provided analysis of the responses. I found the templates of Survey Maker to be more full-featured, yet capable of editing, than those of QuickTapSurvey. However, upon signing up for QuickTapSurvey, I received a welcome e-mail and an offer to help design my first questionnaire—proof that that the glowing reviews of QuickTapSurvey on the App Store were accurate.

I have used the SurveyMonkey app in the past for various surveys to groups and found it very flexible, easy to use for creating and distributing surveys, and helpful in providing analysis (although "garbage in/garbage out" applies, so you need to structure your questionnaire carefully). Creating the surveys does take a little bit of getting used to, but the app is free (for basic use), and regular people are familiar with it.

CONCLUSION

The benefits of engaging in this sort of communication with clients are many. It encourages building a relationship, keeping channels of communication open, and learning about problems before they become unsolvable. Plus, once designed, the questionnaires can easily be adapted to other cases and clients without great effort. Engaging clients in their cases is crucial, and a good way to do this is by soliciting their input via questionnaires. ■