

# rate your firm's professional services <sup>1</sup>

Always	Usually	Sometimes	Rarely	Never	Don't know	To evaluate how well you and your firm do in serving client needs, circle the response that best represents what you do or how you view what happens in your firm.
5	4	3	2	1	0	Lawyers and staff at our firm strive to reach a high standard of client service and good client relations.
5	4	3	2	1	0	Our firm has and follows client service policies and performance standards.
5	4	3	2	1	0	I want the service I provide to create an excellent impression of me and my firm, so I constantly look for ways to improve the service I provide.
5	4	3	2	1	0	I have signed retainer agreements in all my files.
5	4	3	2	1	0	I am on time and prepared for all meetings and client appointments.
5	4	3	2	1	0	I create an atmosphere that helps my clients feel that they can ask me a question if they don't understand something or if they want more information.
5	4	3	2	1	0	I make an effort to write and speak to clients clearly in language without legal jargon.
5	4	3	2	1	0	I have strong technology skills and I am using technology to better serve and communicate with my clients.
5	4	3	2	1	0	I return all phone calls and e-mail messages within 24 hours.
5	4	3	2	1	0	I keep my work area/office clean and neat because I know clients will draw conclusions about me and my firm based on what they see.
5	4	3	2	1	0	I am alert to my client's verbal and non-verbal reactions, and respond to these signals by looking for ways to be more effective.

<sup>1</sup> The questions in this survey were adapted, with permission, from a series of questions that appeared in "7 Keys to Great Client Service," produced by the Canadian Bar Association's Lawyers Care Initiative in 2001.

This assessment originally appeared in *Managing a Better Professional Services Firm*. It can be found at [www.practicepro.ca/managingbooklets](http://www.practicepro.ca/managingbooklets). The practicePRO and TitlePLUS programs are provided by LAWPRO.

5	4	3	2	1	0	I show patience and courtesy regardless of the client's behaviour, my mood and my workload.
5	4	3	2	1	0	I anticipate issues and events that might affect my clients, and discuss these matters with them. I am proactive, not reactive.
5	4	3	2	1	0	I am aware of my client's expectations of me and the work I am doing for them.
5	4	3	2	1	0	I know how my clients perceive me.
5	4	3	2	1	0	I consider each client an asset to my practice and treat each client as a valued customer.
5	4	3	2	1	0	We know why clients choose us.
5	4	3	2	1	0	My firm asks for feedback from clients in formal and informal ways.
5	4	3	2	1	0	We review client feedback to help us to improve our legal services and find new areas for growth.
5	4	3	2	1	0	Most of our clients return to us to and refer their associates, family members and friends to us.

To calculate your score, add up the total of the numbers you circled.

TOTAL: \_\_\_\_\_

**Rating your firm's professional services:**

**90-100** Your professional services are exemplary.

**75-90** You have a high awareness of the importance of client services, but there is room for improvement.

**66-75** It is time to upgrade behaviours inconsistent with providing high-quality client service.

**Below 65** You need to carefully review your attitudes, practices and standards on client service and assess how they can be improved.

Use your answers to this survey and the information in this booklet identify and address areas of poor client service.