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How Firms Can Use Feedback to Create an Internal Service Culture

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Troutman Pepper's Shana Beldick and Daniel Pulka provide tips on how to foster an internal service culture by moving past a scattered approach for collecting feedback and applying best practices for a firm's non-lawyer business professionals.

Law firms are increasingly implementing formal processes to gather feedback on the client experience. But when it comes to the internal client experience—the service that attorneys and employees receive from a firm's business professionals—feedback is often ad hoc and focused more on problems than best practices.

Firms looking for a better approach, however, can use their external efforts to build a model for internal service. That's what we did at Troutman Pepper after our 2020 merger.

Here's how our first administrative department feedback survey led to establishing internal service standards, along with tips for other firms looking to launch similar initiatives.

Step One: Determine Your Approach

When Troutman Pepper merged, we didn't just bring together 1,100 attorneys across 23 cities. We also combined our business professional teams, technology systems, and processes for everything from writing a client alert to opening a new matter.

We knew that a combination of this size would have some speed bumps, and last year, we wanted to better understand what was working and what wasn't.

Although we had never sought internal feedback on a large scale, we had done so externally with our firmwide electronic client feedback surveys. We decided to take a similar approach here.

Our client experience and human resources teams partnered with consultants at the Wicker Park Group, who help us with client feedback, to design a survey that would gather quantitative and qualitative feedback on our administrative functions.

Tip: Use your client feedback surveys and interviews as a model for your internal feedback efforts. Identify key themes from client feedback, such as responsiveness and ability to problem solve. Ask questions to see how your internal teams measure up against these key performance indicators.

This will allow you to determine firmwide service strengths and to see if internal service affects interactions with clients.

Step Two: Seek Feedback From a Broad Group

In designing our survey, we needed to determine our audience. We considered different constituencies, from partners to attorneys to all timekeepers, before eventually settling on sending the survey firmwide.

We found this was the right decision. Having all our people participate in the survey drove engagement and created buy-in for our post-survey actions. More importantly, however, the broad participation gave us more robust and actionable feedback, especially given that we found different groups within the firm had different needs and expectations when it came to internal service.

Tip: Consider making your survey anonymous to encourage respondents to be as candid as possible. For Troutman Pepper's survey, we asked for employee ID numbers for the sole purpose of breaking down the results by demographics, such as attorney versus staff or office by office.

Only the team at the Wicker Park Group saw the full results—no one at the firm could view an individual's survey. At the end of the survey, we allowed respondents to self-identify if they required follow-up, allowing us to close the feedback loop on individual issues.

Step Three: Share Results and Make Them Actionable

After conducting a client feedback interview, Troutman Pepper's client experience team always prepares a report with next steps and encourages attorneys to share the feedback with the full client team. Empowering all team members with practical, actionable ways to address the feedback makes progress much more likely.

For our internal survey, our partners at the Wicker Park Group helped us compile firmwide trends that we shared with all attorneys and staff. More importantly, they also provided summary reports to each chief officer.

These documents mirrored our client feedback reports and included trends seen in the survey responses as well as suggested follow-up actions. Our chief officers then worked with their teams to develop a response plan to the feedback.

Tip: In addition to summarizing trends from the feedback, consider sharing all narrative comments from the survey with appropriate stakeholders. While the quantitative data provides important information about areas for improvement, the qualitative data offers important context about the individual experience.

Step Four: Reinforce Best Practices

The purpose of feedback isn't just to identify problems. We also use feedback to uncover and institutionalize best practices. This is what we did with our internal administrative department survey.

Following the survey, we launched the firm's first set of business professional service standards. These standards reinforced comments from the survey about what good service looks like within Troutman Pepper.

For example, one common theme in the survey was how much people valued colleagues who took ownership of a request. These colleagues prioritized thoughtful, timely responses from start to finish and who used their subject matter expertise to understand what may be behind a request.

Tip: Give your internal feedback efforts staying power by continuing to recognize good service after the survey is complete. Plan an internal campaign that reinforces the findings of the survey and shares new instances of exceptional service.

For example, we launched a quarterly staff recognition program that honors those business professionals who exhibit our standards. Our first honorees included the 100+ business professionals called out by name in the survey.

Focusing on the employee experience is a prerequisite to delivering exceptional client service. By leveraging their external client feedback efforts, law firms can begin to take a more disciplined and productive approach to improving their internal client service, too.