PRE-PROGRAM QUESTIONNAIRES
BENEFITS & BEST PRATICES
NALP ANNUAL EDUCTION CONFERENCE
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Pre-Program Questionnaires

When building programs for lawyers, it is the goal of every professional development professional to design a program that directly addresses the needs and expectations of the lawyers participating in the program. While he/she may have a general understanding of what those needs and expectations are, getting more specific knowledge will allow the PD professional to construct a program that meets that goal.

One strategy for creating effectively tailored programs for lawyers is preceding those programs with a pre-program questionnaire. These questionnaires can be used to elicit information from the program participants', such as areas of interest, their areas of weaknesses, their level of activity in a specific area, what they deem important, and a host of other information useful in tailoring programs. Below is a list of benefits and best practices related to pre-program questionnaires.[1]

Benefits

- **Tailoring Content**

  After the PD team selects a program topic, the pre-program questionnaire is a great tool for tailoring the program for the attendees. Using the responses can lead the PD professional to add, remove or modify agenda items; or simply emphasize certain agenda items over others. Note: of course not all lawyers will respond to the questionnaire, but those who do respond are likely going to be the lawyers who will be more engaged in the program. It makes sense to infuse the program with the thoughts and comments from those who are more engaged and who will take the most from the program.

- **Engaging Lawyers**

  Pre-program questionnaires can be a means to get lawyers more engaged in a program prior to the commencement of the program. The questionnaire not only lets the lawyers feel that the program is being designed with their valuable input, but it can also be a vehicle to get the lawyers interested (dare we say, excited) about the upcoming program. A higher level of interest in a program, means a higher rate of attendance.

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[1] This Benefits and Best Practices summary is accompanied by two pre-program questionnaires used by law firms, as well as a summary of the responses to those questionnaires. One questionnaire was created for a business development program and the other for a client service program.

Responses Used as a Training Tool

Well designed questions can result in the responses themselves being used directly in the program to enhance the depth and quality of the training.

> *Example: In the accompanying Summary of Responses for the Business Development program, the responses revealed that lawyers participated in networking events more than any other business development activity, yet they viewed that activity to be one of the least effective for developing business. During the program, the trainers explored why attending networking events was not viewed as being as successful and they determined that many lawyers (a) were not going to the right events, (b) did not research the event/attendees and prepare a plan, (c) did not have a polished description of what they do (i.e. elevator pitch), and (d) viewed "success" as getting business, rather than starting a dialogue and establishing a relationship with a prospective client or prospective referral.*

Impact Development of Future Programs

Because questionnaire responses can reveal challenges that lawyers are having in their practices, they can serve a guide to developing future programs to help those lawyers address those challenges.

> *Example: In the Summary of Reponses for the Client Service program, the lawyers viewed understanding & meeting client expectations as the most important factor in delivering great client service. At the same time, those lawyers found that understanding and meeting those expectations was the greatest challenge they faced in servicing the client. Seeing the need, the PD group was then able to build a program from the ground up that trained lawyers how to more effectively understand, manage and meet client expectations.*

Impact Future Conduct of Lawyers

Reviewing survey responses can certainly provide the PD group with valuable insight into their lawyers. When those responses are strategically shared with the lawyers participating in the training, the results can also provide the lawyers with insight into what their colleagues are thinking and experiencing. This insight can lead to lawyers changing the way they practice, interact with clients, engage in business development activities and more.

> *Example: In the Summary of Responses for the Business Development program, only 4 of the 21 responding lawyers participated in hosting training events at state bars and other associations. However, this activity received the highest effectiveness rating from the lawyers who hosted such training events. By seeing the level of success their four colleagues enjoyed through hosting training events, the lawyers who had not offered such training were able to work with their Business Development groups to identify and design similar training opportunities for themselves.*

Best Practices

When using a questionnaire to solicit input from lawyers about an upcoming program, following the guidelines below will enhance your chances of increasing your response rate and receiving more useful information from the responders.

- **Provide Program Detail**

  When providing the questionnaire to the prospective attendees, rather than merely giving them a general program description like “business development,” “client service,” or “networking,”, provide them with an outline of the agenda and/or a detailed description of the program that explains the content and the outcome you intend the program to have. The more detail the prospective attendees have, the better able they are to offer meaningful input about the program.

- **Encourage Participation in Questionnaire**

  The more questionnaire responders you have, the more useful the information you will get. Be creative (and aggressive) in encouraging prospective attendees to respond to the questionnaire. A couple of suggestions:

  - Draft an email to be sent by the managing partner or other influential member of the firm expressing the importance of the program and encouraging participation in the pre-program questionnaire; or

  - Bribe them! Offer gift cards or some other knick knack for participating. You can opt for a low cost participation gift for all questionnaire responders (e.g. a pen, coffee mug or $10 gift card), or offer higher dollar gifts to a select few through a random drawing (e.g. offer a $150 gift card to three responders drawn at random)

  There is always a cost in putting on a program. The additional cost you incur for encouraging pre-program participation will lead to marked results and be well worth the investment.

- **Avoid Time Intensive Questionnaires**

  It should go without saying that the questionnaire should be as non-intrusive on the prospective attendees’ time as possible. Accordingly, the number of questions should not exceed 15 (8 – 12 is optimal). Additionally, to limit the amount of time a questionnaire takes to complete, the majority of questions should offer multiple choice and/or check-the-box responses. The structure of these questions (and the choices offered) should be well thought out to ensure that they bear useful information.

While most of the questions should offer the responders choices, the responses that provide the most guidance to the PD professionals for structuring programs are those that provide the responders with free space to write. You should attempt to include at least two or three questions that allow the responders to explain their challenges, successes, expectations and desires.

- **Follow Through**

If prospective attendees have taken the time to provide thoughtful responses to your questionnaires, then it is critical that you make the effort to incorporate those responses (as appropriate) into the program, or if possible, in future training. The lawyers should feel that the input they offered through the questionnaire played a role in shaping the program.

- **Share the Data**

Share the results of the questionnaires with the responders in some way, shape or form. Sharing the information can enlighten the program attendees as to the thoughts and opinions of their colleagues, which information may be useful in the attendees' practice going forward. Additionally, lawyers will be more engaged when you provide an analysis of information that *they* have provided.

Lastly, sharing the data and explaining how it was used to modify the program is valuable because it lets lawyers know that the PD group listened to them and attempted to build a program to suit their needs. For those who responded, but whose responses were not in the majority that drove the changes to the program, an explanation of how the information was used will tell them why the program is structured the way it is (to the extent that the numbers justify it, try to use the responses that were not used to shape the current program to build another program to address the issues raised by the responders, and communicate your intention to do so).

Business Development Program
(Pre-Program Questionnaire)

Initial page should have fields for First Name, Last Name and email address. Each of these is optional.

1. How long have you been at ***[The firm]***?

2. What practice group are you in?

3. How much direct interaction have you had with clients in the context of business development related activities over the last year?

    a. ***Daily,***
    b. ***3-4 times per week,***
    c. ***1 or 2 times per week,***
    d. ***A few times per month***
    e. ***Occasionally***
    f. ***Never***

4. Have you done any business development training with ***[The Firm]*** or any other firm?

    a. ***Yes***
    If so, what type(s) of training have you completed?
    ____
    b. ***No***

5. What types of business development activities have you engaged in (check all that apply)?

    a. ***Publishing articles,***
    b. ***Hosting seminars or training programs at state bars and other associations***
    c. ***Hosting in-house seminars or training programs***
    d. ***Participating in seminars or training programs sponsored by third parties***
    e. ***Attending networking events (e.g. sponsored by your firm, bar associations, awards organizations, etc.)***
    f. ***Blogging***
    g. ***Engaging through social media platforms***
        i. ***LinkedIn***

ii. *Twitter*
iii. *Google+*
iv. *Facebook*
v. *YouTube*

h. ***Providing targeted information to clients or prospective clients***
i. ***Asking contacts and/or colleagues for referrals***
j. ***Networking (or cross-selling) within the firm***
k. ***Other*** ___________________________

6. What activities above did you find the most effective (pick up to three*)?*

   a. ***#1 Most Effective*** _______________________________
   b. ***#2 Most Effective*** _______________________________
   c. ***#3 Most Effective*** _______________________________

7. What challenges you have faced in your business development efforts?

8. The following topics will be the primary focus of the business development program at the Retreat. Please rank these topics from one to four in order of importance to you and therefore deserving of the most time (one being the most important and four being the least important).

   a. Understanding the needs and expectations of your clients (from the perspective of presenters who recently worked as in-house or general counsel)
   b. Understanding your practice niche (identifying, developing and delivering your value proposition/elevator pitch)
   c. Building your brand within your firm and the legal/business communities including strengthening your social media presence
   d. ***Developing, growing and maintaining a business network (from prospects and dormant connections to existing clients)***

9. Please share what you hope to gain from this program.

10. What other topics (or subtopics), if any, would you find useful to cover in a business development program?

11. Are you aware of any of the firm's internal business development resources?

    a. ***Yes***
    If yes, what business development resources offered by the firm have you taken advantage of? _____________________________________

    b. ***No***

12. The facilitators for this session have experience as general counsel (as well as in private practice) and with leading marketing and business development efforts at a large law firm. Given their backgrounds, please share any questions or challenges you may have for them with respect to business development (e.g., understanding the firm's intake process for new clients, building a book of business, leveraging cross-selling opportunities, communicating with clients effectively, understanding client expectations, etc.).

SUMMARY OF RESPONSES
BUSINESS DEVELOPMENT PROGRAM

Most Effective Business Development Activities

Questionnaire participants were asked to identify what business development activities they have conducted. They were then asked to select the three most effective activities. The participants had ten activities from which to choose, and the option to choose "other".

Activity	# of Lawyers Conducting Activity	Total Favorable Points*	# of Lawyers Favorably Ranking Activity**	# of Lawyers Ranking Activity #1	Effectiveness Rating***
In-Firm Networking & Cross-selling	19	28	12	5	1.47
Providing Targeted Information	16	25	11	5	1.56
Asking for Referrals	12	19	8	4	1.58
Attending Networking Events	21	11	6	2	0.52
Hosting Training Events (associations)	4	9	3	3	2.25
Joining 3rd Party Training Events	15	6	3	1	0.40
Hosting In-House Training Events	9	5	3	1	0.55
Publishing Articles	10	4	4	0	0.40
Other	3	2	1	0	0.67
Blogging	6	0	0	0	0
Engaging Via Social Media	9	0	0	0	0

* Total Favorable Points – An Activity that was ranked the most effective by a questionnaire was given 3 points, 2nd most effective was given 2 points and 3rd most effective was given 1 point. The Total Favorable Points simply totals the amount of points each activity was given based on how effective the participants found them.

** # of Lawyers Favorable Ranking Activity – This number represents that number of lawyers who identified that activity as either most effective, 2nd most effective or third most effective business development activity.

*** Effectiveness Rating – This number represents the level of effectiveness an activity was found to be by the lawyers. The higher the number, the more effective. It is calculated by dividing the Total Favorable Points by the # of Lawyers Conducting the Activity.

Client Service Program

(Pre-Program Questionnaire)

1. What is your position?

    a. ***Partner***
    b. ***Of Counsel***
    c. ***Associate***
    d. ***Other ________________________***

2. How do you define success with a client?

3. In order of importance, pick the top three keys to providing a great customer experience?

    a. ***Legal knowledge and strong technical legal skills***
    b. ***Strong project management skills***
    c. ***Listening to the client***
    d. ***Understanding the client's business***
    e. ***Understanding and meeting client's expectations***
    f. ***Responsiveness***
    g. ***Efficiency***
    h. ***Business savvy***
    i. ***Being a good communicator***
    j. ***Being a problem solver***
    k. ***Other _______________________________***

4. Of the list of keys in #3 above, which is the greatest challenge for you?

5. What would your clients say sets you apart from other lawyers?

6. How often do you work with non-legal professionals at ***[The Firm]*** (such as business development, marketing, knowledge management, administration professionals) in connection with servicing your clients?

    a. ***Never***
    b. ***Once or twice a year***
    c. ***3 to 10 times a year***
    d. ***Once a month***
    e. ***More than once a month***

7. What are some challenges you have faced in working with your clients <u>(check all that apply)?</u>

a. ***Client not responsive***
b. ***Client micromanaging***
c. ***Pricing pressure from client***
d. ***Demanding client***
e. ***Client not clear about what he/she is looking for***
f. ***Client is indecisive***
g. ***Over communicates – too many questions/suggestions***
h. ***Unrealistic expectations with respect to*** <u>(check all that apply)</u>***:***
    i. ***Responsiveness***
    ii. ***Quality of work***
    iii. ***Results***
    iv. ***Costs***
    v. ***Budget forecasting***
    vi. ***Knowing what client wants (client wants a mind reader)***
    vii. ***Frequency of communication***
    viii. ***Other*** ______________________________
i. ***Other***_______________________________________

8. Have you ever asked a client to evaluate your work or give you feedback after a matter concluded?

    a. ***No***
    b. ***Yes (if yes),***
        i. ***how many times have you asked clients for such feedback in the last 12 months?***
            1. ***Once***
            2. ***2 – 5 times***
            3. ***More than 5 times***

        ii. ***how valuable was the feedback you received?***
            1. ***Very valuable***
            2. ***Somewhat valuable***
            3. ***Not valuable***
            4. ***Client did not provide feedback***

9. Please give an example of a win you or a colleague had in providing a client with excellent client service.

10. Briefly describe something you heard a lawyer from another firm do to service a client that impressed you.

11. Briefly describe what sets ***[The Firm's]*** client service apart from other firms.

12. Briefly describe what your expectations are for the program and/or what you hope to gain from it.

SUMMARY OF RESPONSES
CLIENT SERVICE PROGRAM

Greatest Challenge Faced In Working With Clients

Partners, Counsel & Associates were asked to identify the greatest challenges they face in working with clients. They could pick one or more of the eight challenges listed. 54 lawyers responded.

Challenge Faced in Working with Clients	Total # Selected		% Selected	
1. Pricing Pressure	43		80%	
2. Unrealistic Expectations w/ Respect to:	24		44%	
Costs		*19*	*79%**	*35%***
Results		*15*	*63%*	*28%*
Budget Forecasting		*9*	*38%*	*17%*
Knowing What Client Wants (Mindreading)		*5*	*21%*	*9%*
Responsiveness		*2*	*8%*	*4%*
Other		*2*	*8%*	*4%*
3. Client Not Sure What He/She is Looking For	20		37%	
4. Client is Not Responsive	15		28%	
5. Demanding Client	13		24%	
6. Client is Indecisive	10		19%	
7. Client is Micromanaging	9		17%	
8. Overcommunicates – Too Many Questions/Suggestions	6		11%	

* 24 lawyers chose Unrealistic Expectations as a client challenge. The first column of percentages under "Unrealistic Expectations w/Respect to:" represents the percentage of those 24 lawyers who chose the corresponding subcategory. *Example: 19 of the 24 lawyers (79%) chose "Costs" as a subcategory of Unrealistic Expectations.*

** The second column of percentages under "Unrealistic Expectations w/Respect to:" represents the percentage of all 54 lawyers surveyed who chose the corresponding subcategory. *Example: 19 of all 54 lawyers (35%) chose "Costs" as a subcategory of Unrealistic Expectations, which is 35% of all lawyers surveyed.*

KEY TO PROVIDING GREAT CLIENT SERVICE

Partners, Counsel & Associates were given a list of 10 factors that allow lawyers to provide great client service. They were asked to select the first, second and third most important factors. 55 Lawyers responded.

Keys to Great Client Service	1st	2nd	3rd	Total # Selected	Weighted Score*	% Selected
Understanding & Meeting Client Expectations	27	15	5	47	1.53	85%
Responsiveness	6	12	17	53	2.31	64%
Listening to the Client	11	6	4	21	1.67	38%
Problem Solver	3	3	9	15	2.40	27%
Legal Knowledge & Technical Legal Skills	5	7	3	15	1.87	27%
Understanding the Client's Business	2	7	5	14	2.21	25%
Good Communicator	1	4	7	12	2.50	22%
Efficiency	0	1	3	4	2.75	7%
Business Savvy	0	0	2	2	3.00	4%
Strong Project Management Skills	0	0	0	0	N/A	0%

*Weighted Score – The Weighted Score was calculated as follows: [(1 * 1st most important response) + (2 * 2nd most important response) + (3 * 3rd most important response)] divided by the Total # Selected. The lower the number representing the "Weighted Score", the higher that item was ranked

GREATEST CHALLENGE TO PROVIDING GREAT CLIENT SERVICE

Partners, Counsel & Associates were asked their one greatest challenge in providing great client service. 49 lawyers responded.

Greatest Challenge to Providing Great Services	Total # Selected	% Selected
Understanding and meeting client expectations	9	18%
Responsiveness	9	18%
Understanding the client's business	7	14%
Efficiency	6	12%
Legal knowledge and strong technical legal skills	3	6%
Strong project management skills/time management	3	6%
Listening to the client	3	6%
Good communicator	3	6%
Problem solver	2	4%
Managing client's expectations	2	4%
Business savvy	1	2%
Patience	1	2%