

Seeing through a client's eyes

Are mystery shoppers just for restaurants and hotels or can professional services firms also benefit from their insights? Lara Squires believes they can and put them to the test at her firm.



By Lara Squires

In common with all law firms, Mayo Wynne Baxter – a long established Sussex-based firm that employs around 200 people – is constantly striving to differentiate itself from the competition, and as is widely acknowledged, the major thing that law firms can use to differentiate is service.

We all like to think that we offer excellent service to our clients and certainly the feedback we received from clients was that we were very good at what we do. Feedback, however, tends only to come from established clients and we were keen to ensure prospective clients received the same level of service as those we've known and worked with for years, from first visit to the website or phone enquiry to signing on the dotted line. Were service standards being maintained throughout the business development and client acquisition stages

or were we losing potential clients due to lapses in service that we weren't even aware of?

We realised that to maximise our acquisition rate we needed an objective view of the process that prospective clients use to decide whether we are the law firm they want to retain. We were already running focus groups to obtain qualitative feedback to sit alongside quantitative data being generated by client questionnaires, but we realised that we really needed an outside agency that could take the client view.

Mystery shopping has been common in the retail and tourist sectors for some years (and thanks to Mary Portas has recently become a lot higher in profile) but it's still relatively rare within professional services. I had met Jonathan Winchester of Shopper Anonymous (www.shopper-anonymous.co.uk) on a number of occasions and had been impressed with his knowledge and passion for customer service, so we started a conversation with him about how mystery shopping a law firm might work.

When instructing Shopper Anonymous we decided to break the project down into smaller steps, initially separating mystery shopping the front of house staff from mystery shopping the legal advisers. We split the two functions for accountability purposes, to see if there was a difference in service levels between front of house and

legal staff. One might expect front of house staff to be better at customer service so we thought they might need different types of training to legal advisors who might be more focused on the legal advice than their customer service. We also mystery shopped the management teams (including the marketing team!) to see how we all dealt with supplier enquiries, taking the view that every contact is a potential client or referrer.

Once the mystery shopping programme started, mystery shoppers visited the offices, they rang our published phone numbers and they made enquiries via the website. For the phone testing we asked them to call both in and out of office hours, to check quality of our follow-up in dealing with voicemails. We gave the mystery shoppers scenarios to test, developed for us by every head of department, so they were all very plausible enquiries. The level of detail the mystery shoppers went into was pretty impressive, measuring not only how helpful the member of staff was but details such as the inflection in their voice and whether they answered the phone with a smile. They really picked up on the smallest of details.

For example, one of the mystery shoppers was tasked with leaving a message on our out-of-hours answer phone on a Saturday evening and was able to report that she'd been called back before 11am on the Monday morning, who had called her and

which questions that member of staff did or didn't ask to understand the nature of the enquiry.

On the other hand another mystery shopper called during office hours but had to call twice before her call was answered – something we took immediate action to remedy. When her call was answered our staff member didn't identify herself by name; something else we were quick to rectify when the report came through to us as we know that customers like to know who they're talking to.

A mystery shopper who walked in to one of our offices commented positively on everything from the flowers on reception to the temperature of the coffee she was served but noted that no one asked for her contact details, so obviously no follow up would have been possible. Again, a lesson learned and acted upon, especially as a fellow mystery shopper who made an enquiry by email made the same comment.

The staff knew we were undertaking a programme but didn't know when the calls or enquiries were going to come in. The results of the mystery shops were fed back to the staff on a monthly basis and every month we had a winner based on the mystery shoppers' overall scores, with winners being the staff members who had the highest percentage scores. Winners received a bottle of champagne or a voucher of their choice and the opportunity to win really motivated the teams.

The heads of department also received the mystery shopping reports for their team-members to allow them to address any specific issues that may have arisen.

Luckily our managing partner was on-board from the start. He's always been completely behind our focus on client service as he recognises that it's our main differentiator in the market, so he supported my decision to instigate the mystery shopping programme right from the beginning.

In fact pretty much all our fee-earners and support staff were behind the project. There were inevitably a few who expressed a few concerns about what they saw as the 'big brother' aspect of it, with someone

checking up on them, but most of them liked the fact that we ran it as a competition and they particularly liked the fact that mystery shopping was as much a recognition of the good service you're already providing as much as a way of looking for what's not being done so well.

Because they knew it was going to be happening, staff were really interested to know the results and really engaged with

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the programme. Even now we still get comments 'I think that might have been a mystery shopper' and quite often it's not – but that's good because it means they're always thinking about customer service. Staff feedback on the whole process has been overwhelmingly positive.

The report we received from Shopper Anonymous after the first round of mystery shops were complete highlighted our many strengths as well as some of the issues we needed to address. The report outlined various ways to address those issues and made suggestions for both immediate and longer term changes to improve the customer experience, all of which we've embraced to the benefit of the business.

More recently we have undertaken a second round of mystery shopping but this time shopping the whole firm, from an individual in the post room to the partners. This has provided us with valuable feedback on every member of the team, and we've continued with this company-wide programme ever since, on a regular basis.

Luckily, the feedback from the mystery

shoppers has been predominantly positive about Mayo Wynne Baxter! In particular they continue to single out the knowledge of our advisors, the polite manners of those they speak to and meet and the efficiency with which their enquiries are handled.

Where we were clearly falling down, however, was on the follow-up, with feedback from mystery shoppers saying that we hadn't followed up after an initial enquiry. The legal advice was rated very highly but when the customer said they were going to think about it we weren't following up the next week or at a later date. This was across the board, at all levels of the business, and is now our main focus for improvement, with strategies in place to change the firm's culture to be more sales focused. We're looking to give the team (particularly legal advisors) confidence to know that customers don't mind being phoned to see if they want to go ahead. We know this is something a lot of law firms struggle with and we're glad we've had the opportunity to recognise and tackle a problem that has a direct impact on the bottom line of the business.

The whole process has been hugely beneficial to the firm, improving the engagement of the team with the whole client (and potential client) experience. When we run our staff sessions (which are held annually) we often do a break out slot on Client Service where we will ask for examples of good and bad service. Our aim is for team members to put themselves in a client's shoes, which is both illuminating for staff and hugely valuable. Client satisfaction scores suggest we're not only getting it right but also making it even better.

Customer service is key to our firm's success in both acquiring and retaining clients. The mystery shopping programme is now a central part of ensuring we maintain our standards in making sure potential customers are served and welcomed onto our client list as quickly and effectively as possible.

Lara Squires is business development manager at Mayo Wynne Baxter solicitors, based in Sussex.
