Many firms struggle to get participation when implementing a client feedback program. This guide provides a simple framework for creating accountable, actionable feedback processes.

1. Each month, after invoicing is complete (or substantially complete, as many invoices linger), generate a list of the top XX invoices. The number will vary depending on your firm. Perhaps start small, and just get a list of the top 10 invoices. If your firm performs several small projects for the same clients, perhaps instead generate the list of top 10 clients by billings each month.

2. Armed with the list, run the "Last Survey Sent" report in Client Feedback Tool, found here: http://www.clientfeedbacktool.com/cft/feedback/LastSurveySent.aspx. In the options tab, select whether to display by project (if using the top 10 invoices) or display by client (if using top revenue by client).

3. Compare the two reports. Any project or client that hasn't been surveyed in the last XX days (60 is recommended) coordinate with the project manager or appropriate party to initiate the most relevant survey. You may want to measure more often (perhaps every 30 days) and alternate between different contacts. One month, survey the primary client contact. The next month, survey a sub-consultant, the month after survey another vested party in the project. This provides a broad perspective and a continuous stream of insight without ever facing survey fatigue.

4. A week later, run the Last Survey Sent report again, and verify that all outstanding surveys have been sent or scheduled. If not, escalate to leadership for attention and action.

Once the basic habits of asking for feedback have developed around the top projects/clients, begin broadening the accountability matrix to include more items on the list. Generally speaking, target capturing the top 80% of your revenue in the feedback process.

Do leave some checks and balances in place:

1. Do not send a survey to the same contact more often than every 45-60 days, unless you have specific permission to do so.

2. Do respect clients who request to be opted out of the process – but negotiate an alternative method to gather their feedback and confirm performance meets their needs.

3. Do commit to following-up to every low score (and ideally every response – even if just with a thank you). Check the "Surveys Needing Follow-up" report (http://www.clientfeedbacktool.com/cft/feedback/NeedFollowup.aspx) on a weekly basis to assure no outstanding low scores are left unattended. The only thing worse than not knowing about a problem is knowing and not acting on it.

As much as possible, keep the process simple, and work to empower your project managers. If one pushes back that timing isn't right, gain commitment to a date they will solicit feedback. If the timing is poor because of a suspected problem, now is usually the BEST time to ask. Once the problem is on the table, both sides have a far easier time addressing it and discussing the solution.

Finally, be sure to share discovered successes regularly. Use the "Surveys With Follow-Up" report (http://www.clientfeedbacktool.com/cft/feedback/WithFollowup.aspx) monthly to check for problems that have been well resolved. Publish those stories in order to create additional excitement and momentum towards client listening.