

BRAINSTORMING

Client surveys

To evaluate client service and satisfaction, use this approach to gather essential information from your team. Brainstorming sessions encourage participants to share information and insights that may not come up in conversation. These are the insights that provide the foundation of an effective client survey. Keep in mind, brainstorming sessions don't just happen. They require planning to ensure they are successful. Use this checklist to prepare for a brainstorming session with your team.

Meeting preparation

1. Identify the list of participants. Include team members who represent a number of positions within the practice. Determine whether participants represent a wide range of thinking styles.
2. Identify the purpose of this session and what you hope to accomplish.
3. Communicate the purpose to participants before the session and give them adequate time to consider the issues. Prepare and circulate an agenda before the meeting.

Meeting exercise

A comfortable setting helps promote conversation. Before participants arrive, be sure you have all your tools in place: markers and paper for keeping track of responses and sticky notes for participants to use to write down their thoughts. Refreshments, while not essential, can help relax the crowd.

Because the success of the session is influenced by the enthusiasm of the people involved, begin with an icebreaker to put participants in a creative mood. This can help participants leave the world of linear thinking and feel comfortable about offering their ideas. Icebreakers should be fun and unrelated to the task at hand. Consider the following:

1. Take a random object (book, coffee mug and so on) and ask how it can be improved by adding batteries.
2. Ask participants what comes closest to describing them, a tree or ketchup bottle. Then ask them to explain why.
3. Ask participants to come up with different names for objects: tree, camera and so on.

It's time to get down to business. Restate the purpose and objective of the session. For example, "We are here

to gather information to create a client feedback survey. The results will help ensure we're meeting our clients' needs and expectations."

The ground rules

1. There are no right or wrong answers.
2. All participants will have an opportunity to speak.
3. Feedback and discussions are welcome.

Guiding the discussion

1. Write down all responses as communicated.
2. Periodically review with the group the feedback they've provided.
3. Encourage everyone to participate and don't allow strong personalities to dominate.
4. Don't follow one train of thought too long.
5. Contain the session to about 30 minutes.
6. Before adjourning, provide a recap of discussion topics and indicate next steps.

Not all the information may be immediately useful, but the feedback can provide a broader and deeper understanding of the types of issues you should address as you develop the client survey.