



Osprey Approach: Client Feedback

This help guide was last updated on
Jul 25th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=44092>



Designed to be imported as extra tasks into existing work types. Allows the monitoring of feedback and if the matter is web enabled, the client can complete the feedback via the client portal

Questionnaire

Please fill in the Questionnaire below:

Your feedback is important to us. Please let us know how we did in each of the below areas

Ease of Access

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Fixing an Appointment

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Keeping an Appointment

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Receptionist

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Staff Behaviour

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Progression of Work

Please Select

Call backs

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Replies to Emails/Letters

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Keeping you Informed

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Explanation of Information and advice

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Quality of Service

Please Select

Please Select

Very Good

Good

Average

Poor

Very Poor

Approachability and Friendliness

Please Select

Please Select

Very Good

CLIENT FEEDBACK

Ease of Access

Please Select	▼
Please Select	
Very Good	
Good	
Average	
Poor	
Very Poor	

Fixing an Appointment

Please Select	▼
Please Select	
Very Good	
Good	
Average	
Poor	
Very Poor	

Keeping an Appointment

Please Select	▼
Please Select	
Very Good	
Good	
Average	
Poor	
Very Poor	

Receptionist

Please Select	▼
Please Select	
Very Good	
Good	
Average	
Poor	
Very Poor	

Staff Behaviour

Please Select	▼
Please Select	

CLIENT FEEDBACK CONCERNS

Details of what we could have done better

Any Concerns Identified

Please Select ▼

Please Select

Yes

No

Further Action Required

Please Select ▼

Please Select

Yes

No

Details of Further Action Required

Submit Cancel

Feedback Questionnaire

{INCLUDETEXT

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Client Feedback Questionnaire

{ MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }/{ MERGEFIELD MATTER_MATTER_DESCRIPTION }

Your feedback is important to us. Please let us know how we did in each of the below area.

	Very Good	Good	Average	Poor	Very Poor
Ease of Access	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fixing an Appointment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Keeping an Appointment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receptionist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff Behaviour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Progression of Work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Call backs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Replies to Emails/Letters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Keeping you Informed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Explanation of Information and advice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Approachability and Friendliness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please let us know if we could have done anything better

	Yes	No
Would you Recommend us to others	<input type="radio"/>	<input type="radio"/>
Is there anything we can do to improve our service	<input type="radio"/>	<input type="radio"/>
Details of what we could have done better		

{INCLUDETEXT

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letter enclosing feedback

questionnaire

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Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ QUOTE { DATE \@ "d MMMM yyyy" } }

{ IF {MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_SURNAME_2 }" "{ MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_2 } { MERGEFIELD LINKNAME_SURNAME_2 }" }" }
{ MERGEFIELD CALCULATION_ADDRESS }

Dear { IF {MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_SURNAME_2 }" "{ MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_2 }" }" }

Re: { MERGEFIELD MATTER MATTER_DESCRIPTION }

Further to the conclusion of your matter, I would like to thank you for instructing { MERGEFIELD PRACTICEINFO_PRACTICE_NAME } to assist you.

To help us improve our service we would be grateful if you could take a moment to complete our short client feedback questionnaire and return in the enclosed pre-paid envelope.

If you feel that any element of our service fell below your expectations, please let us know so that we can enhance our service in the future.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME}*UPPER }

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Letter Responding to Clients

Concerns

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Your Ref:

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Re: { MERGEFIELD MATTER MATTER DESCRIPTION }

Thank you for providing me with your feedback on our service. I understand that you feel that we could make some improvements and I would like to take the opportunity to respond to your concerns.

If you wish to discuss this matter further, please do not hesitate to contact me.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

{INCLUDETEXT

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Letter to Client Chasing Feedback

on Service

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Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ QUOTE { DATE \@ "d MMMM yyyy" } }

{ IF {MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_SURNAME_2 }" "{ MERGEFIELD LINKNAME_TITLE_1} & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1}" "{ IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" "{ MERGEFIELD LINKNAME_TITLE_1} { MERGEFIELD LINKNAME_INITIALS_1} { MERGEFIELD LINKNAME_SURNAME_1}" "{ MERGEFIELD LINKNAME_TITLE_1} { MERGEFIELD LINKNAME_INITIALS_1} { MERGEFIELD LINKNAME_SURNAME_1} & { MERGEFIELD LINKNAME_TITLE_2} { MERGEFIELD LINKNAME_INITIALS_2} { MERGEFIELD LINKNAME_SURNAME_2}" }" }
{ MERGEFIELD CALCULATION_ADDRESS }

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Re: { MERGEFIELD MATTER MATTER_DESCRIPTION }

Further to my previous letter requesting feedback on our service, I note we have not received a response from you. We strive to provide a high level of service to our clients and your feedback enables us to maintain these standards. I would be grateful if you do have a spare moment that you complete our short questionnaire. If I do not hear from you in the next 7 days, I will proceed to closing your matter.

Yours sincerely

**{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }**

{INCLUDETEXT

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Email to Client responding to


concerns

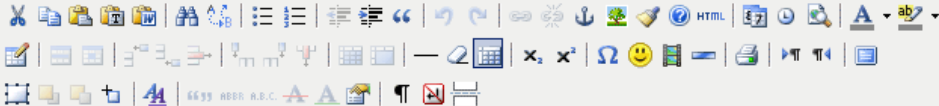
Subject

{MATTER\$FEE_EARNER_ID}/{MATTER\$CLIENT_NO}/{MATTER\$MATTER_NO} - {MATTER\$MATTE

MESSAGE BODY

 E-mail Template <<

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Dear {Formula\$Cli_Names},

Thank you for providing me with your feedback on our service. I understand that you feel that we could make some improvements and I would like to take the opportunity to respond to your concerns.

If you wish to discuss this matter further, please do not hesitate to contact me.

Yours Sincerely

{CALCULATION\$FEE_EARNER_DESCRIPTION}

{PRACTICEINFO\$PRACTICE_NAME}


Email to Client Chasing online


Feedback Questionnaire


Subject

{MATTER\$FEE_EARNER_ID}/{MATTER\$CLIENT_NO}/{MATTER\$MATTER_NO} - {MATTER\$MATTE

MESSAGE BODY

 E-mail Template ⏪

B *I* U ABC |  Styles | Paragraph | Font Family | Font Size



Dear {Formula\$Cli_Names},

Further to my previous email requesting feedback on our service, I note we have not received a response from you. We strive to provide a high level of service to our clients and your feedback enables us to maintain these standards. I would be grateful if you do have a spare moment that you complete our short questionnaire by logging in to our client portal. If I do not hear from you in the next 7 days, I will proceed to closing your matter.

Yours Sincerely

{CALCULATION\$FEE_EARNER_DESCRIPTION}

{PRACTICEINFO\$PRACTICE_NAME}


Email to Client Feedback


Questionnaire

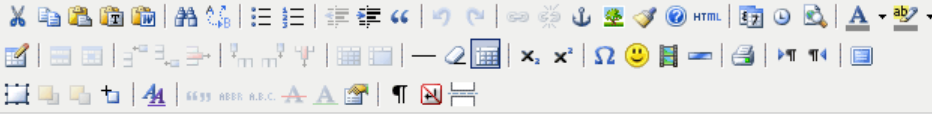
Subject

{MATTER\$FEE_EARNER_ID}/{MATTER\$CLIENT_NO}/{MATTER\$MATTER_NO} - {MATTER\$MATTE

MESSAGE BODY

 E-mail Template ⏪

B *I* U ABC |  Styles | Paragraph | Font Family | Font Size



Dear {Formula\$Cli_Names},

Further to the conclusion of your matter, I would like to thank you for instructing {PRACTICEINFO\$PRACTICE_NAME} to assist you.

To help us improve our service we would be grateful if you could take a moment to complete our short client feedback questionnaire. To complete the questionnaire please log in to your client portal and you will be prompted to complete the survey.

If you feel that any element of our service fell below your expectations, please let us know so that we can enhance our service in the future.

Yours Sincerely

{CALCULATION\$FEE_EARNER_DESCRIPTION}

{PRACTICEINFO\$PRACTICE_NAME}