# Osprey Approach: Client Feedback

This help guide was last updated on
Aug 30th, 2023

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

Osprey™ Approach

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

# 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 | ○ | ○ | ○ | ○ | ○ |
| Fixing an Appointment | ○ | ○ | ○ | ○ | ○ |
| Keeping an Appointment | ○ | ○ | ○ | ○ | ○ |
| Receptionist | ○ | ○ | ○ | ○ | ○ |
| Staff Behaviour | ○ | ○ | ○ | ○ | ○ |
| Progression of Work | ○ | ○ | ○ | ○ | ○ |
| Call backs | ○ | ○ | ○ | ○ | ○ |
| Replies to Emails/Letters | ○ | ○ | ○ | ○ | ○ |
| Keeping you Informed | ○ | ○ | ○ | ○ | ○ |
| Explanation of Information and advice | ○ | ○ | ○ | ○ | ○ |
| Quality of Service | ○ | ○ | ○ | ○ | ○ |
| Approachability and Friendliness | ○ | ○ | ○ | ○ | ○ |

**Please let us know if we could have done anything better**

| | Yes | No |
|---|---|---|
| Would you Recommend us to others | ○ | ○ |
| Is there anything we can do to improve our service | ○ | ○ |
| Details of what we could have done better | | |

# letter enclosing feedback

# questionnaire

{INCLUDETEXT "C:\\Users\\JaneE\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisorApp_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\97583c88-6bf4-43e6-b460-9c8b6d8728f8\\header.doc"}

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 }**

# Letter Responding to Clients

# Concerns

{INCLUDETEXT "C:\\Users\\JaneE\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisorApp_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\e10670e2-59fa-4b82-8e33-fc47c3e3d390\\header.doc"}
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 }**

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 }**

# Letter to Client Chasing Feedback

# on Service

{INCLUDETEXT "C:\\Users\\JaneE\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisorApp_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\48a3eb83-15b1-42af-a8a3-dd4b007ef5c4\\header.doc"}

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 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 }**

# Email to Client responding to

# concerns

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

## MESSAGE BODY

E-mail Template

Styles | Paragraph | Font Family | Font Size

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

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**

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}