

WHAT CLIENTS SAY ABOUT THEIR SATISFACTION WITH COLLABORATIVE PROFESSIONALS

*By: Linda K. Wray, J.D.
On behalf of the IACP Research Committee*

The Committee wishes to thank Lydia Ulrich and Don Winspear of Crescent Research, Inc. for their tireless efforts in providing the data necessary for this analysis to be made; Gay G. Cox for her careful review and editing of the numbers; and Kalisia Findley, LL.B., LL.M. for her work analyzing data and editing the paper.

A previous article in this Review reveals that the IACP Client Experience Survey data shows client satisfaction with Collaborative Practice overall, with the process and with the outcome of their case. What is somewhat troubling about the data is that the retention by clients of a financial professional or one or more mental health professionals did not significantly alter client satisfaction across any of these three broad categories and in fact seemed to be correlated with a very modest decrease in satisfaction. This article explores client satisfaction with lawyers, mental health professionals and financial professionals and concludes that a deeper analysis of the data supports the perception of many Collaborative professionals that an interdisciplinary approach provides value added to clients in Collaborative cases.

Background

As noted in the *What Clients Say About Their Experience In The Collaborative Process* [p. ____], more than one-half of all clients who responded to the IACP Client Experience Survey were involved in an interdisciplinary Collaborative process. Fifty-nine percent (59%) engaged a financial professional, 87% of whom worked with both parties. Forty-eight percent (48%) engaged at least one mental health professional. Seventy-three percent (73%) of cases with a financial professional had at least one mental health professional. Eighty-nine percent (89%) of cases with at least one mental health professional also had a financial professional. The overall

settlement rate of cases reported by clients was 90%, with 10% of cases terminating prior to settlement of all issues. Clients' retention or lack thereof of a financial professional or one or more mental health professionals did not alter the settlement rate.¹

Satisfaction was measured on a 5 point scale as follows: 5 - extremely satisfied; 4 - somewhat satisfied; 3 - neutral; 2 - somewhat dissatisfied; and 1 - extremely dissatisfied.

Satisfaction with Collaborative Lawyers

Clients were asked to rate their satisfaction/dissatisfaction with their own lawyer across a list of functions. Clients indicated that they were somewhat satisfied or better with the performance of their own lawyer across all functions:

- Maintaining respect for you personally and for your viewpoint (4.56)²
- Explaining matters so that you understood what was happening at each stage of the case (4.41)
- Listening (4.41)
- Identifying goals, interests, needs and concerns (4.28)
- Assessing how the options met goals, interests, needs and concerns (4.24)
- Communicating effectively with all participants (4.19)
- Assisting you to determine which options were most acceptable to you both (4.18)
- Helping develop a parenting plan (4.18)
- Assisting to develop options for issues (4.13)
- Assisting with gathering information (4.06)

Notably, except with respect to the function of “helping develop a parenting plan” clients satisfaction with their own lawyer’s performance increased (although not to a statistically significant level) across all functions if a financial professional or one or more mental health professionals were involved in the case, as shown in Figure 1 below.

Figure 1: Clients' Satisfaction with Their Own Lawyer if a Financial Professional or One or More Mental Health Professionals were Retained

Function	Rating of One's Own Lawyer	Rating of One's Own Lawyer if FP was Involved in Case	Rating of One's Own Lawyer if MHP was Involved in Case
Maintaining respect for you personally and for your viewpoint	4.56	4.62	4.62
Explaining matters so that you understood what was happening at each stage of the case	4.41	4.51	4.51
Listening	4.41	4.45	4.49
Identifying goals, interests, needs and concerns	4.28	4.36	4.40
Assessing how the options met goals, interests, needs and concerns	4.24	4.31	4.31
Communicating effectively with all participants	4.19	4.25	4.24
Assisting you to determine which options were most acceptable to you both	4.18	4.22	4.27
Helping develop a parenting plan	4.18	4.28	4.11
Assisting to develop options for issues	4.13	4.19	4.25
Assisting with gathering information	4.06	4.13	4.18

Clients were also asked to rate their satisfaction/dissatisfaction with the performance of the other Collaborative lawyer. Clients were somewhat less satisfied with the other lawyer, indicating that they were neutral to somewhat satisfied with the performance of the other lawyer across all functions:

- Maintaining respect for you personally and for your viewpoint (3.68)

- Helping develop a parenting plan (3.65)³
- Listening (3.61)
- Assessing how the options met goals, interests, needs and concerns (3.59)
- Identifying goals, interests, needs and concerns (3.57)
- Explaining matters so that you understood what was happening at each stage of the case (3.50)
- Assisting to develop options for issues (3.47)
- Communicating effectively with all participants (3.46)
- Assisting you to determine which options were most acceptable to you both (3.41)
- Assisting with gathering information (3.40)

Except with respect to the function of “helping develop a parenting plan” and “explaining matters so that you understood what was happening at each stage of the case,” clients’ ratings for the other Collaborative lawyer decreased somewhat if there was a financial professional on the case and increased somewhat if there was no financial professional on the case.

Except with respect to the function of “communicating effectively with all participants” and “assisting with gathering information,” clients ratings for the other Collaborative lawyer also decreased slightly if there was a mental health professional on the case and increased slightly (though not to a significantly different level) if there was no mental health professional on the case.

While the difference in satisfaction with one’s own lawyer and the other lawyer is, for the most part, not statistically significantly affected by the presence of financial or mental health professionals, the consistency in the direction of the data is unmistakable. One can imagine that clients are more satisfied with their own lawyer, if the work of the mental health professional(s) and/or financial professionals with whom their lawyer has presumably encouraged clients to use, is viewed as helpful to clients, as is suggested in the discussion below. Moreover, the presence of mental health and/or financial professionals may have in fact enhanced the ability of clients’ lawyers to perform with greater competence, both in terms of substantive matters and in terms of

handling client dynamics. It is more difficult to explain the seeming decrease in satisfaction with the other lawyer when mental health and/or financial professionals are part of the Collaborative team. It is possible that the other lawyer is seen as serving less of an important function when mental health and/or financial professionals are used.

Satisfaction with Collaborative Mental Health Professionals

Clients were also asked to rate their satisfaction/dissatisfaction with the mental health professionals on their case across a list of functions. Client responses as to the first mental health professional (mental health professional 1) can be reported; however, there were two few cases with two and three mental health professionals to report client satisfaction with each of these professionals. The combined scores for all three mental health professionals however, can be provided. Clients indicated that they were somewhat satisfied or better with the performance of mental health professional 1 and with all three mental health professionals combined across most, but not all, functions:

- Listening (4.35, 4.30)⁴
- Maintaining respect for you personally and for your viewpoint (4.28, 4.29)
- Managing communications between all team members (4.15, 4.23)
- Helping manage emotions (4.14, 4.11)
- Creative problem-solving (4.12, 4.02)
- Managing conflict (4.12, 4.09)
- Providing information about child development (4.10, 4.09)⁵
- Maintaining his/her neutrality if serving in a neutral capacity (4.10, 4.09)
- Helping develop a parenting plan (4.09, 4.02)
- Helping develop co-parenting skills (4.09, 4.02)
- Providing your children with a voice (4.03, 4.13)
- Assisting you and the other participant with improving communication (4.03, 4.00)
- Identifying goals, interests, needs and concerns (3.98, 3.94)

- Assisting you and the other participant with redefining your family structure (3.95, 4.00)
- Assisting you with redefining your identity apart from the other participant (3.86, 3.81)
- Managing the case so that it proceeded at an appropriate pace (3.72, 3.71)

Notably, clients' ratings for the mental health professional increased across all functions if there was a financial professional on the case.

Figure 5: Clients' Satisfaction with Mental Health Professional 1 as Impacted by Retention of Financial Professional

Function	Rating of MHP1	Rating of MHP1 if an FP was Involved in Case
Listening	4.35	4.47
Maintaining respect for you personally and for your viewpoint	4.28	4.39
Managing communications between all team members	4.15	4.25
Helping manage emotions	4.14	4.24
Creative problem-solving	4.12	4.28
Managing conflict	4.12	4.21
Providing information about child development	4.10	4.32
Maintaining his/her neutrality if serving in a neutral capacity	4.10	4.24
Helping develop a parenting plan	4.09	4.27
Helping develop co-parenting skills	4.09	4.27
Providing your children with a voice	4.03	4.22
Assisting you and the other participant with improving communication	4.03	4.11

Identifying goals, interests, needs and concerns	3.98	4.08
Assisting you and the other participant with redefining your family structure	3.95	4.10
Assisting you with redefining your identity apart from the other participant	3.86	4.00
Managing the cases so that it proceeded at an appropriate pace	3.72	3.87

There are two few cases with no financial professionals and at least one mental health professional to report on clients' ratings of MHP1 if there is no financial professional. However, the direction of the data suggests that having no financial professional on cases is significantly correlated with lower ratings for MHP1 across all functions, thus suggesting the value of a full interdisciplinary team.

Satisfaction with Collaborative Financial Professionals

Finally, clients were asked to rate their satisfaction/dissatisfaction with the financial professional on their case across a list of functions. Clients indicated that they were somewhat satisfied or better with the performance of their financial professional across all functions:

- Maintaining his/her neutrality, if serving in a neutral capacity (4.44)
- Maintaining respect for you personally and for your viewpoint (4.36)
- Communicating effectively with all participants (4.20)
- Listening (4.20)
- Assessing how the options met goals, interests, needs and concerns (4.11)
- Explaining financial matters so that you understood what was happening at each stage of the case (4.11)
- Identifying goals, interests, needs and concerns (4.09)
- Assisting to develop options for issues (4.06)
- Assisting you to determine which options were most acceptable to you both (4.06)
- Assisting with gathering information (3.94)⁶

Clients' satisfaction with their financial professionals' performance increased significantly (<.05 level of significance) across all functions if one or more mental health professionals were involved in the case:

Figure 6: Clients' Satisfaction with a Financial Professional as Impacted by Retention of One or More Mental Health Professionals

Function	Rating of FP	Rating of FP if MHP was involved	Rating of FP if No MHP was involved
Maintaining his/her neutrality, if serving in a neutral capacity	4.44	4.62	4.00
Maintaining respect for you personally and for your viewpoint	4.36	4.57	3.80
Communicating effectively with all participants	4.20	4.54	3.33
Listening	4.20	4.47	3.47
Assessing how the options met goals, interests, needs and concerns	4.11	4.30	3.57
Explaining financial matters so that you understood what was happening at each stage of the case	4.11	4.38	3.40
Identifying goals, interests, needs and concerns	4.09	4.32	3.43
Assisting to develop options for issues	4.06	4.33	3.33
Assisting you to determine which options were most acceptable to you both	4.06	4.30	3.36
Assisting with gathering information	3.94	4.21	3.21

The number of cases with a financial professional and no mental health professional is significantly less than 50 and thus these findings are directional only. Nonetheless, the

consistency in the direction of the data across all functions is striking, suggesting a significant value to inclusion of mental health professionals in cases involving substantive financial issues as well as in cases involving children.

Client's View of the Usefulness of Collaborative Professionals

As another measure of the value of the interdisciplinary process, clients were asked about the usefulness generally of all Collaborative professionals on their case. Forty-eight percent (48%) of the respondents (53 clients) answered these questions which were added after the pilot project. Seventy-four percent (74%) reported that all the professionals on their case were necessary; of those, 63% had a financial professional on their case and 54% had one or more mental health professionals on their case. Twenty-six percent (26%) of the respondents (12 clients) reporting on this question stated that one or more professionals were not necessary.⁷

Clients' Perception as to the Reasonableness of Fees

Finally, the value of all Collaborative professionals from the perspective of clients is evidenced by clients' views of professional fees paid in their cases. Clients were likely to see professionals' fees as very reasonable or somewhat reasonable. Eighty-one percent (81%) of clients considered the fees charged by their lawyer as very reasonable or somewhat reasonable. Clients' views of the fees attorneys charged did not change significantly if a financial professional or mental health professional was on the case.⁸

Seventy-nine percent (79%) of clients considered the fees they paid for mental health professional(s) as very reasonable or somewhat reasonable. Interestingly, clients' views of the fees charged by mental health professionals *improved* slightly if there was a financial professional on the case (84% vs. 79%).

Eighty-one percent (81%) of clients considered the fees they paid a financial professional as very reasonable or somewhat reasonable. As with clients' view of fees paid to mental health professionals, clients' views of the financial professionals' fees *improved* if there was a mental health professional on the case (92% vs. 81%).

Concluding Summary

Clients generally expressed satisfaction with the Collaborative professionals on their case. Of particular note is the finding that the presence of an interdisciplinary team resulted in greater client satisfaction with individual professionals. That is, clients were more satisfied with their own lawyer if the client also worked with one or more mental health professionals and/or a financial professional; they were more satisfied with a mental health professional on their team if there was also a financial professional on the team; and they were more satisfied with their financial professional if there were one or more mental health professionals on their team. Client reports that they were largely satisfied with the professional fees charged, adds weight to the finding that clients were generally satisfied with their Collaborative professionals. Moreover, the reports about satisfaction with fees again points to the value of an interdisciplinary team; clients' views of the fees charged by mental health professionals improved slightly if there was a financial professional on the case, and their views of fees charged by a financial professional improved slightly if there were one or more mental health professionals on the case.

¹ For a discussion of the research methodology and demographics of clients who responded to the IACP Client Experience Survey, see *What Clients Say About Their Experience In The Collaborative Process* [pgs. ____].

² Male respondents rated their own lawyer significantly higher than female respondents on this factor (4.71 vs. 4.42 – <.1 level of significance)

³ Male respondents rated the other lawyer significantly higher than female respondents on this factor (4.08 vs. 3.23 – <.1 level of significance)

⁴ The first score is for mental health professional 1 and the second for all mental health professionals.

⁵ Female respondents rated MHP1 significantly higher on this factor than male respondents (4.41 vs. 3.71 - <.01 level of significance).

⁶ Female respondents rated the financial professional significantly higher than male respondents on this factor (4.18 vs. 3.67 - <.01 level of significance)

⁷ The number of clients (12) who reported that one or more Collaborative professionals were unnecessary is too small to provide a breakdown of which professionals were regarded as unnecessary.

⁸ Three respondents with MHPs on their case found their lawyer's fees to be not at all reasonable; in contrast there were no respondents with no MHPs on their case who found their lawyer's fees to be not at all reasonable. This difference was statistically significant but because the number of respondents is so low, it is not given any weight at this time.