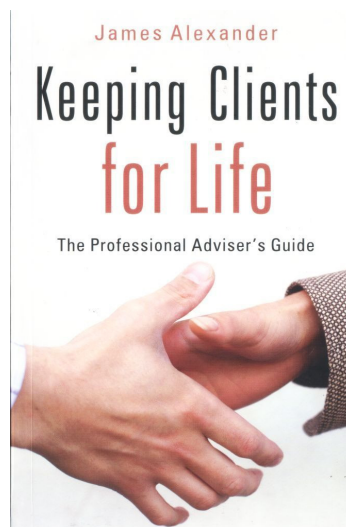


Keeping Clients for Life

The Professional Adviser's Guide



Author: James Alexander
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About the Author:

James Alexander is an experienced trainer and consultant who has spent many years helping both companies and individuals improve performance in a variety of contexts.

James spent a number of years as a senior trainer and lecturer in industry, local government and further education before setting up his consultancy, Alexander Associates.

■ The Big Idea

There is a real need for practical guides regarding client care for professional advisers of all descriptions – from lawyers and accountants to website designers and business consultants.

The author explains the basic principles of client care and shows how to set up a program to ensure a contented and loyal client base so essential to the growth and survival of any professional firm in today's increasingly fickle markets. The overall theme is creating and keeping clients for life.

■ Why You Need This Book

This book addresses aspects of client care that are relevant at all levels of the organization, from the senior partner to the newest recruit and the most junior staffer – as well as to the one-man band or small partnership.

Areas covered include:

- the concept of client care – looking after the people who buy services rather than goods
- understanding and exceeding clients' expectations
- designing and promoting a client care policy
- using client care to promote the firm
- optimizing all aspects of communication with clients
- procedures for handling complaints
- evaluating the ongoing success of the client care program

■ The Concept of Client Care

There is an increasing tendency among companies and enterprises of all sorts to take better care of clients and customers. The recognition of the vital importance of such people to the continuing prosperity and fortune of businesses is now being seen as a matter of utmost concern. In times of economic pressures and contracting markets, the concept is even more potent.

Many organizations have posted notices around their premises proclaiming such profound messages as:

**The
Customer is
King**

**Client Care
Is Our
Future**

These are all very well, but they are often ignored after a little initial attention. On the other hand, many organizations have done little more than talk about the idea and send a few people to attend charm courses. Naturally, the intentions are smothered at birth and the old ways re-emerge as the norm.

Client Care in a service-providing firm is defined as **contact between members of the firm and clients or potential clients that is positive, productive and which leads to better relationships.**

In this context, 'members' can be further defined as everyone in the firm from the MD to the newest clerical assistant – without exception!

■ The Client Expects

In choosing a service provider, a member of the public has a range of considerations to ponder before heading towards you and your firm:

From a personal standpoint:

- The client needs to feel important, that he or she is the only concern of the adviser when being seen and that the matter in hand is recognized as being of the utmost importance.
- The client will hope to find evidence of trust developing between client and adviser.

From an environmental point of view:

- Clients scarcely ever like to be open to public scrutiny as if they were part of a peep show. There needs to be a discreet waiting area where the client can feel comfortable.
- Many clients look for evidence of a green or environmentally friendly approach.

There are also financial expectations:

- Clients will expect to have the costs of the service explained and presented in an understandable form.
- Clients may choose a firm on the basis of their comparative cheapness (or expensiveness, if that is the cachet), and may expect to see a tariff.

Consequently, they have strong expectations about the professionalism of the advisers they choose:

- Clients will expect the outcomes of their matter to be satisfactorily determined and worked for.
- Clients will expect that their adviser will be committed to their cause.

Quality is another expectation from both individual and corporate clients:

- Quality means improved service and that will very likely differentiate you from your competitor.
- Quality service to clients promotes efficiency and saves costs – and, not to mention, boosts your reputation immeasurably.

■ **Designing the Policy Statement**

A client care policy statement needs to be thought through and written most carefully to encapsulate the intentions of the firm and to provide a clear remit to the advisers and staff.

It is only by having a carefully prepared and universally distributed policy and code of practice that levels of performance can be standardized throughout the firm.

The following is an example of such a global client care policy statement:

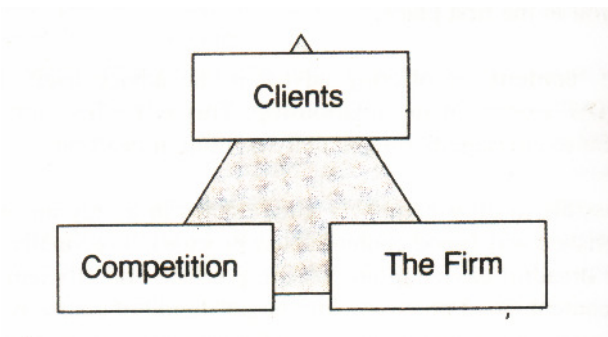
This firm aims to be the principal provider of [xxxx] services to the public in this area and we commit ourselves to offering the very best of care to all clients, from the private individual to corporate clients from industry and commerce.

To do this, we intend to provide a quality service of utmost integrity and responsiveness, upholding traditional standards of thoroughness and enterprise. We recognize the vital importance of our clients to our success as professional [xxxx] advisers. We equally recognize the vital importance of ourselves and our services to our clients' well-being and satisfaction. Every effort will be directed by all members of the firm to achieve these aims.

The wording of a client care policy statement should be clear and unambiguous. It should be meaningful to every member of the firm, no matter what job is held. It is the firm's encompassing client care statement from which all activities and practices will spring.

■ Marketing as a Factor in Client Care

Marketing is a complex and detailed operation, but it can be simplified to a set of three essentials and the way they interrelate. It is crucial to understand the relationships in the triangle, to monitor any changes and to manage the relationships to your advantage.



The corollary of these points is that any changes your firm makes will be eagerly watched by the competition. They will want to step into any gaps and/or strengthen their range of services to make you fight for your increased share of the market.

You must also watch the market. The regional client base can change with industrial expansion (or contraction – both need specialist professional support), with new housing, transportation or commercial projects. Your image must be correct and your quality of service and client care must be equally spot-on to meet these new challenges.

■ Dealing with Complaints

There is a range of activities to reduce black-spot events and other complaint-generating activities:

- Communicate! A major cause of complaints is a breakdown in communications between client and adviser.
- Set up better supervision and checking of incoming and outgoing mail.
- Pay greater attention to detail when making promises about actions to be followed – if you can't deliver, don't say you can!
- Set up closer supervision of tasks delegated to junior colleagues and other staff.

- Ensure closer control of files passing between departments.
- Pay greater attention to the swift resolution of problems.
- Take more care in keeping up to date with current professional practice and procedures.
- Take greater care in identifying, specifying and notifying clients and other about time-limits, no matter what the type of business being discussed.
- Pay more regular attention to 'problem' files.
- Avoid unnecessary delays.
- Improve standards of personal and departmental office keeping and organization.
- Improve prioritizing.
- Improve message taking and delivery. Improve action upon the receipt of messages.

■ Evaluation

Evaluation in the short term is almost impossible if it is to be done in financial terms. Most of the reviewing processes will define and explore feelings rather than facts. They are still valuable methods, though, and lack of hard data does not invalidate the inquiry.

MEASURABLE EFFECTS

- **Income** – the ultimate measure, but one for long-term analysis.
- **Client base** – the many factors that go towards a sound client care program with its consequent greater public profile for the firm can encourage more clients to seek help.
- **Thank you letters and positive comments about the services rendered** – these can be listed and counted and compared with previous periods.
- **Referrals** – personal referral is a powerful way for a business to expand.
- **Recommendations** – major clients and co-professionals who have been well cared for will recommend your firm if they are also satisfied with what you do.
- **Enquiries** – telephone staff should be encouraged to log enquiries before and after a major client program is started.

NON-MEASURABLE EFFECTS

- **Internal climate** – one of the concomitant changes that a client care scheme ought to engender is an improvement in colleague care and a general warming of the climate within the firm.
- **Increased job satisfaction** – there is no doubt that improved client care makes for better feelings about the job.
- **Behavioral changes** – the emphasis on client care can bring about remarkable changes in people.

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