

# What Are Your Service Standards?

by Barb Cotton

In order to provide the high level of service that will ensure a thriving practice, it is important to step back and decide what service standards you will enforce, both for yourself and for your office.

It is difficult to decide what standards you will enforce, as the higher the standard, usually the higher the cost in time, trouble and possibly expense. Just how good is good enough for you?

Beyond the standards mandated by the Code of Professional Conduct and a lawyer's other governing duties and responsibilities, there are no right and wrong answers as to what your standards should be. I therefore offer a smorgasbord of possible standards in order to stimulate your decision making, suggested in large part by: Yona Rogosin in "Asset Management: What's Your Reputation Worth?" *Marketing for Lawyers* 12:4 (August 1998) 1; Alan Weiss in "Consulting Tips from the Million Dollar Consultant: What Actually Constitutes Superior Service" online: Summit Consulting Group at [http://www.summitconsulting.com/articles/bonus\\_41.html](http://www.summitconsulting.com/articles/bonus_41.html); a LESA lecture of Ezra Tom Clark Jr. titled "Working Smarter, Not Harder" on June 22, 2001; the Canadian Bar Association in the Client Care Handbook "7 Keys to Great Client Service" ([www.cba.org/CBA/LCI/Main/handbooks.asp](http://www.cba.org/CBA/LCI/Main/handbooks.asp)); and Patricia Yevics in "Top Twenty Five Tips (Plus One) for Client Relations (In No Particular Order)" <http://www.msba.org/departments/loma/articles/marketing/25tips.htm>.

## **Response Time**

- all telephone calls/emails will be returned/replied to on the same day they are received, or the first thing the next morning if received late in the afternoon
- or all telephone calls will be returned/emails replied to within 2 hours, and if the lawyer is unable to meet this timeframe, a staff member will
- your assistant will be empowered to set up telephone appointments with clients for you

## **Accessibility**

- your clients will be able to reach you after work hours for an emergency, and you will facilitate this by giving your clients your home number and/or cell number
- or will you not be available after work hours
- you will designate a backup and tell your clients who they should contact in your absence
- you will let your clients know you will contact them at home after hours if you are tied up all day
- you will let your key clients know when you will be out of the office for an extended period of time

### **Your Client Will Be the Priority**

- you will meet your client within 10 minutes of the appointed time
- or you will always be on time for appointments
- you will greet the client as if you were happy to see them and make them feel welcome
- you will hold all calls and not allow other interruptions while meeting with the client
- you will meet the client in a clean office or boardroom where only the client's files are in view
- the client will never feel rushed or patronized
- you will maintain eye contact with the client in meetings and call the client by name
- you will not interrupt the client and let them tell their full story
- you will make off the clock visits to the client's site or place of business
- you will proactively send non-promotional articles, ideas, and other resources to the client free of charge
- you will make efforts to learn about your client's business and/or industry and read your client's trade journals
- you will send holiday and other milestone cards to your clients
- you will express appreciation for the business your client is giving you
- you will follow through on all commitments made
- your only measure of success is client satisfaction
- a problem is not solved until it is solved to the client's satisfaction
- you will guarantee each client's satisfaction with your service or you will refund their money
- every member of a client's organization will be considered a client
- a consistent level of service will be provided to all clients, even difficult ones
- you will make "client satisfaction" the first item on the agenda at all partner meetings

### **Communication**

- your priority of client communication will be: (1) face to face (2) telephone (3) in writing
- you will implement a system of regular phone calls to your clients in order to stay in touch
- you will establish realistic expectations and time frames with the client at the onset of the engagement
- all deadlines will be met
- you will provide an initial consultation free of charge
- you will send a letter of welcome to new clients
- you will confirm all important matters in an engagement and/or retainer letter
- you will send non-engagement letters to any potential client you do not accept
- you will copy the client with all documentation, including incoming and outgoing letters and email and transcripts of important voice mail

- you will consult with the client on all strategy decisions and ensure that they know that the final decision is theirs'
- you will clearly explain to all clients the pros and cons of your recommendations
- you will promptly inform the client of all unexpected outcomes and expenses
- you will create an atmosphere wherein clients feel they can ask a question if they do not understand something or if they want more information
- you will make an effort to speak to clients in easily understandable language and avoid legalese in all documents
- you will avoid telling war stories
- you will be able to send documents and other communications to the client electronically and with a compatible platform
- all your letters, emails and invoices will be error free
- client confidentiality will be strictly adhered to, by the lawyer and the staff
- neither will there be a compromise in issues of integrity or ethics
- your office decor and your personal appearance will always be professional
- you will regularly solicit feedback from your clients and review the feedback to help you improve your legal services and find new areas for growth
- you will keep a log of all positive and negative feedback from clients

### **Fees and Billings**

- an explanation of your fees and what disbursements will be charged will be provided at your initial meeting with the client
- an estimate of the total cost will be provided at your initial meeting with the client
- all fee estimates will be honoured
- you will put your fee collection policies in writing and give a copy to all clients at the initial meeting
- your invoices will be submitted in the format, with the information and in the frequency requested by the client
- all of your invoices will be without mathematical errors and typos
- you will offer alternative fee arrangements

### **File Management**

- you will keep the client updated as to the progress of the matter-your client will never have to inquire as to the status of a matter
- you will provide status reports at regular intervals to the client
- you will review all open files every 60 days to make sure that matters are progressing
- no matter will be delegated without the client's express agreement
- you will assume ownership of all mistakes
- you will scrupulously check for conflicts

### **Your Support Staff Will Be Professional**

- you will introduce your key staff to all clients
- the client will not be aggressively screened
- the client will be able to reach a live human, and not be caught in a voice mail

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- your assistant will be able to pronounce the client's name
- the client will not be placed on hold without consent and not for extended periods
- the client will be treated with respect and courtesy by all support staff
- you will appoint a "client concierge" from among your staff to call clients and check in on a regular basis

**Barb Cotton is the principal of Bottom Line Research & Communications, which helps solo and small firm practitioners throughout Alberta on a contract basis with their legal research needs, including the preparation of research memoranda, briefs and factums, including e-factums, or just a quick search and a reporting letter with cases. Barb can be reached at (403) 240-3142, cell (403) 852-3462, fax (403) 242-5756, email [barb@bottomlineresearch.ca](mailto:barb@bottomlineresearch.ca) and her web site is at [www.bottomlineresearch.ca](http://www.bottomlineresearch.ca).**