

# Client Care

## The Challenges Facing Professional Firms

*Expert knowledge means success*

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Note: This publication has not been updated since it was last published. Some of the hyperlinks may have changed and may need updating. In addition, some of the information in this publication may be out of date.

## Changes and Challenges

In 1984, the Office of Fair Trading changed the ground rules for professionals – until then, accountants, solicitors and other professionals were disbarred from any form of marketing, publicity or advertising. Since that date, marketing has become commonplace among professional firms – indeed, many of them have set up a marketing department and now employ dedicated marketing personnel whose objective is twofold:

1. To gain more new clients (or patients or customers, as the case may be); and
2. To ensure that the firm takes great care of their existing clients.

Although specific challenges may vary from profession to profession and practice to practice, professional firms face a number of common concerns:

- Meeting rising client expectations;
- Increasing competition - resulting in pressure on incomes and profit shares;
- Maintaining and raising staff morale;
- Changing patterns of work;
- Dealing with increased regulation;
- New government legislation;
- The growth of the mega-firms;
- Keeping up with rapid technological change;
- Rising city centre rents;
- Improving quality of life.

Research suggests a significant gap between the performance of professional firms and the rising expectations of clients, for example:

- 68% of clients who are lost to a practice name poor personal service as the reason;
- Yet, 37% of buyers of high value professional services do not complain when experiencing problems;
- And when clients do complain, 74% are not happy with the way their complaints are handled.

This publication<sup>1</sup> is designed to help professional firms – like yours – to measure performance and deliver the highest standards of client care.

## Quality Work Doesn't Mean Quality Service

Quality can be an elusive and indistinct concept. It is often mistaken for meaning good or luxurious. Quality is simply meeting client expectations. Delivering service quality is quite different to delivering product quality. There are three reasons for this:

- Professional services are intangible. They are performances rather than objects. Services can't be counted, measured, or tested before they are sold.
- Professional services are heterogeneous and their performance varies from professional to professional, client to client, and day to day. Consistency is difficult to assure because what the firm intends to deliver may differ greatly from what the client receives.
- Production and consumption of professional services are inseparable. Quality is not predetermined in the factory but by the nature of the client relationship. Management control is reduced both by the input of the client and by the individuality of the professional.

The underlying considerations in delivering quality professional services are:

- Service quality is more difficult for the client to evaluate than product quality;
- Service quality perceptions result from a comparison of client expectations with actual service performance;
- Quality evaluations are not made solely on the outcome of a service; they also involve evaluations of the process of service delivery.

Research shows that clients judge service against ten principal criteria:

### 1. Reliability

- Delivering the right service every time;
- Accurate billing;
- Keeping records correctly.

### 2. Responsiveness

- Calling the client back quickly;
- Mailing correspondence promptly;
- Offering convenient appointments.

*"In ten years time, 25% of professional firms will be out of business. Only the best client care providers will survive."*

*Roger Dickens,  
President,  
Birmingham Chamber  
of Commerce and  
Industry*

## 3. Competence

- Knowledge and skill of contact staff;
- Knowledge and skill of support staff;
- Research and development capability.

## 4. Access

- Telephone lines free/not left holding;
- Reasonable waiting time;
- Convenient business hours and location.

## 5. Courtesy

- Care for client property;
- Friendly reception staff;
- Comfortable meeting areas.

## 6. Communication

- Explaining the service;
- Explaining costs and service level options;
- Complaint handling procedures.

## 7. Credibility

- Reputation;
- Personal integrity of staff;
- The degree of hard sell.

## 8. Security

- Respecting client confidentiality;
- Safety of documents;
- Financial security of the firm.

## 9. Understanding the Client

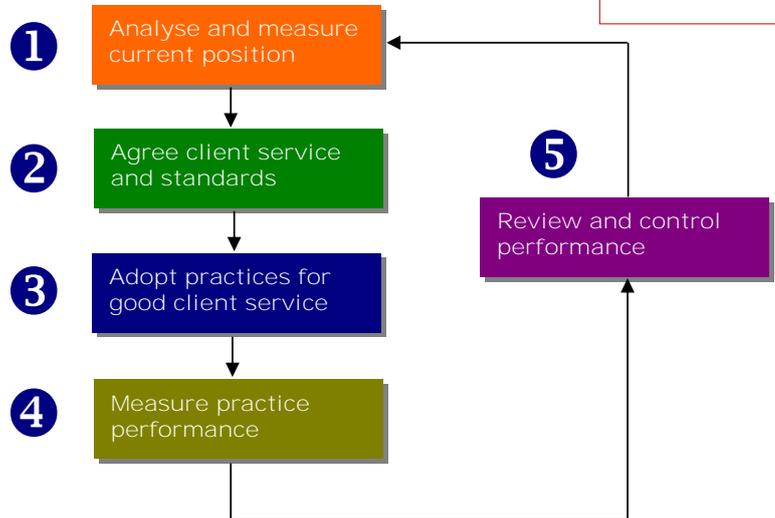
- Learning clients' specific requirements;
- Providing individual attention;
- Recognising regular clients.

## 10. Tangibles

- Equipment and vehicles;
- Appearance of staff;
- Brochures and letterheads.

## Planning to Improve Client Care

The five steps to improving your client care are:



Are you providing a Quality Service?

- Have you defined your standards of service?
- Are you meeting them?

### Stage 1: Analysing and measuring what is happening now

Before any meaningful action can be taken on customer care, you need to understand how you are performing at the present time. The simplest way to achieve this is to ask your clients and your staff.

There are a variety of techniques available to you, including:

- Client surveys;
- Staff surveys;
- Benchmarking;
- Gap analysis.

### Stage 2: Agreeing client service standards

You need to look at the factors which clients use to judge your performance and set measurable standards for each. The ten criteria listed earlier are a good starting point. The more staff you involve in this process, the more accurate the picture will be, as well as a greater commitment to achieving the standards.

Methods for involving staff include asking them to complete questionnaires giving their perceptions of what clients want from the practice and holding brainstorming or discussion groups.

You are seeking to define exactly what is required and develop procedures to ensure that activities are carried out in a uniform way.

Using the telephone is a good example. We may believe we know how to use it well but setting standards for how quickly and in what manner a call should be answered and using a message pad with spaces for all relevant details, can improve performance in a critical area.

### Stage 3: Adopting the practices necessary for good client service

What really counts is having a motivated team who understand the importance of looking after clients. This is a deceptively simple aim but how often are you amazed by the lack of service you receive in hotels, restaurants, or shops?

Behind poor customer service often lies poor staff service. Staff need to be well managed, and a competent leader will recognise that good client care is a result of a whole series of good practices:

- Recruitment: selecting people with the right attitude, particularly front-line staff;
- Standards: letting everyone know what is expected of them;
- Training: practising interpersonal skills;
- Empowerment: giving staff the authority and power to solve problems;
- Incentives and rewards: ensuring staff benefit from improved client satisfaction levels;
- Performance review: giving feedback on how staff are performing and letting staff say how managers are managing.

Training is particularly important. It is essential that all staff are trained to the appropriate level and that training leads to changed attitudes and behaviour. In the case of new staff, it is crucial that they understand from the outset what is expected of them. All too often, however, a new recruit is thrown in at the deep end to do a critical job - answering the telephone.

### Stage 4: Measuring practice performance

Having agreed standards of client care and their delivery, you will need to measure your performance on a regular basis. Ideally the yardstick, method, and frequency of measurement should be agreed by the relevant team at the same time as the standards themselves.

Standards may be measured monthly, quarterly, or annually. You may even measure performance on an individual job or subject basis.

The techniques of measurement are very similar to those described in Stage 1.

### Stage 5: Reviewing and controlling performance to meet the agreed standards

Having measured your actual performance against client care standards, you need to share this information with the relevant individuals and teams. Managers and staff need to discuss areas which either exceed or fall short of the agreed standards.

As a result of these discussions, revised action plans should be drawn up to exploit areas of strength and eradicate areas of weakness.

The difference between an excellent firm and an average firm is the excellent firm's commitment to continuous improvement.

#### Do you have a client care plan?

- Do you know how your clients see you?
- Have you defined your standards of service?
- Do you have client oriented, motivated staff?
- Do you measure your client care performance?
- Do you review your client care plan?

*Review the tools for delivering client care excellence – and prioritise them for your firm.*

## Making it Happen

So far, so good. The case for improving client care is proven and a simple, effective method to do so has been set out.

The bad news is that 70% of such culture change programmes fail. They fail primarily because insufficient attention is paid to the implementation process.

It is a myth that people are afraid of change and, therefore, resistant to new ways of dealing with clients or measuring their performance. After all, how do we feel about a new car or an inheritance from a distant relative? We are not actually afraid of change, but of the unknown.

Good leadership is the key to effective management of change and can be shown by:

- ✓ Creating an environment of trust and shared commitment.
- ✓ Involving staff in decisions that impact on them.
- ✓ Allowing full and genuine involvement as early as possible in the change process.

A participative management style creates greater willingness to accept change. Competent team leaders are vital.

## CAUTION – How NOT to make it happen!

In order to illustrate what needs to be done, Rosabeth Moss-Kanter, a Harvard Professor, has looked at what shouldn't be done with her ten rules for stifling change:

- ✗ Regard any idea from below with suspicion – because it's new and because it's from below.
- ✗ Insist that people who need your approval first go through several other levels of management.
- ✗ Ask departments or individuals to challenge and criticise each other's proposals. (That saves you the job of deciding: you just pick the survivor.)
- ✗ Express your criticisms freely and withhold your praise. (That keeps people on their toes). Let them know they can be fired at any time.
- ✗ Treat identification of problems as signs of failure. This will discourage people from letting you know when something in their area isn't working.
- ✗ Control everything carefully. Make sure people count everything that can be counted, frequently.
- ✗ Make decisions to reorganise or change policies in secret, and spring them on people unexpectedly. (That also keeps people on their toes).
- ✗ Make sure requests for data are fully justified. Data should not be freely available. (You don't want data to fall into the wrong hands).
- ✗ Assign to lower level managers, in the name of delegation and empowerment, responsibility for figuring out how to cut back, lay off, move people around, or otherwise implement threatening decisions you have made. And get them to do it quickly.
- ✗ And, above all, never forget that you, the higher ups, already know everything important about this business.

If you can see something of yourself or a colleague reflected here, you will have already worked out where the changes need to begin.

## Putting Your Plans into Action

We hope that what you have read so far will help you in developing plans for improving your firm.

The next step is to put your plans and ideas into action. Call us for details about these initiatives:

- Client care surveys;
- Running focus groups;
- Staff attitude surveys;
- Benchmarking programmes;
- Staff development programmes;
- Marketing programmes;
- Business development and strategy training.

### Do you have a client oriented and highly motivated team?

- Do you welcome new ideas?
- Are you always open and honest with colleagues?
- Do you involve all staff in decision making?
- Are team leaders trained in people management.

*Conduct a staff attitude survey. Discuss the findings with your team.*



### The last word on Client Satisfaction

Client satisfaction (CS) is a simple formula with P being Perception and E being Expectation):

$$CS = P \text{ less } E$$

## Further Information

This guide is for general interest - it is always essential to take advice on specific issues. We believe that the facts are correct as at the date of publication, but there may be certain errors and omissions for which we cannot be responsible.

If you would like to receive further information about this subject or other publications, please call us – see our contact details on the next page.

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