Must-Do Tips No 47 – Working Well With Clients

On the face of it, this is possibly our daftest newsletter title yet. After all, why would any professionals NOT want to work well with their clients? But, strange as it may seem, there are quite a number of firms, their partners, and associates or managers who appear to go out of their way to prove just how out of tune and touch that they are with the organisations they serve. And often they get what they deserve...

"Having received nothing in the past six months, unannounced, they then just sent me a huge bill that blew my budget big-time and put the finance people here into orbit! Personally, it caused me a huge amount of grief. You can imagine how keen I am to use that firm again"

This month we offer three things to make the important job of working well with clients...work well. And they have a common theme which is..

Tip 1 - be business-like

Probably the biggest issue for most commercial clients is how unbusiness-like their professional advisers can appear. In their world, providing estimates of cost and agreeing a budget, getting bills out regularly, being rewarded for successful performance rather than 'time served' etc., are pre-requisites for success in serving their external or internal clients and customers. Increasingly, they bring these expectations to dealing with us. Which unfortunately is what many firms still do NOT do. The good professionals we come across get to know how their clients operate in their world, and **then** tailor what their firms do to match this. As a result, clients like them and give them more business.

Tip 2 - create ways of working

And by this we don't just mean sending a letter of engagement to new clients and that's it. In much of the business world, client organisations originate and implement specific processes (ways of working if you like) that make the task of defining, agreeing, and delivering on client or customer expectations much easier because it is **all** made explicit to everyone. Unfortunately, the world of the professions can often be immune - and in some cases, allergic - to this idea. *"We are different to other organisations"*, they chime, *"you can't bottle what we do".* But they are not and you can. The smart firms have recognised this, and go out of their way to make explicit the service levels that clients can expect, and the behaviours that both parties should adopt to do the work, pay for work done, resolve problems etc.

Tip 3 - review everything (and learn)

One thing that we can almost always guarantee in talking with professional firms is that **a)** they usually have some sort of process for reviewing their performance with clients post-transaction, and that **b)** compliance for such review is generally low.

For many professionals, reviewing what they have done for clients is neither technically-challenging nor usually fee-generative - thus it is simply not a priority. Moreover, it could be positively dangerous and a threat to their perceived professional competence. After all, what if the client says that (s)he wasn't happy? The best client businesses are more grown up about all this and use such feedback as the lifeblood of gauging their success and making improvements to what they offer. Why should we be any different? So incentivise partners to conduct regular reviews and use the feedback - just like clients do.

People Scope works with firms to help them improve their client experience. To know more, hit 'Reply' and type **Client Experience**.

Of course you could always....go to our website at www.peoplescope.com.

We welcome feedback on what you think about "Must-Do Tips". If you like it hit 'Reply' and tell us specifically what you have enjoyed. If there is a topic or issue that you would like us to cover what is it? And if there is something that annoys, tell us too! We want to improve.

Finally, if you do NOT wish to receive "Must-Do Tips", press 'Reply' and type 'Unsubscribe': we will do exactly that.

Best regards.

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