

What You Can Expect from this Best Practice

PURPOSE

- To create specific service standards appropriate for each client segment
- To consistently deliver these service standards to each client segment
- To prioritize your client servicing tasks to make best use of your time
- To delegate client servicing tasks to your Assistant (if applicable)
- To prevent diverting time, energy and resources to the clients who demand it at the expense of those clients who are paying for it

EXPECTED RESULTS

You will enjoy:

- Efficient use of financial and human resources to deliver services to each client segment (80% of the time, energy and resources dedicated to high value clients who create 80% of the revenue)
- An automated and consistent service program for each client segment
- An increase in proactive outbound communication leading to a decrease in inbound reactive communication (more control)
- Greater trust and loyalty (advocacy) from your clients, particularly your high value clients
- An empowering sense of control and peace of mind.

Your clients will:

- Find comfort in the proactive and consistent client-focused servicing

ACCOUNTABILITY

You will:

- Deliver an exceptional client experience to your high value clients
- Deliver an appropriate baseline client experience for all other clients
- Use technology to consistently complete tasks associated with delivery of the experience

Your clients will:

- Find comfort in the proactive and consistent client-focused servicing
- Willingly recommend your services to friends and family