

## 1 Put Clients First, Always!

Regularly chat with clients to understand their goals and challenges. Tailor our services to fit them like a glove. Put yourself in their position – how would you like to be dealt with?

### Example

Imagine you're a tailor making a bespoke suit. You wouldn't just guess the measurements; you'd take the time to understand the client's style and fit preferences to create the perfect suit.



## 2 Communicate Like a Pro

Set response time goals for emails (8 hours), calls (same day), new client inquiries (4 hours). Use Iris/Outlook tools to keep track and stay on top of things. If you can't action the request then provide an acknowledgement with a timetable. Under promise, over deliver!

### Example

Think of yourself as a superhero with a communication cape. When a client sends an email, you swoop in and respond faster than a speeding bullet!



## 3 Build Bonds, Not Just Business

Assign dedicated account managers, check in regularly, and host fun client events to build a sense of community.

### Example

Host a "Client Appreciation Day" with a fun theme, like a beach party, where clients can relax, network, and enjoy some sunshine and ice cream.



## 4 Know Thy Client Inside Out

Enhance on-boarding, refresh client profiles, and offer tailored advice based on industry trends.

### Example

Be like Sherlock Holmes, digging deep into your client's business to uncover their unique needs and aspirations. Elementary, my dear Watson!



## 5 Be the Sage of Business and Tax

Stay updated on the latest regulations, train staff, and develop sector-specific expertise.

### Example

Picture yourself as a wise old sage on a mountaintop, dispensing valuable business and tax advice to clients who seek your wisdom.



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## OF CLIENT SERVICE

## 6 Deliver Reports with Pizzazz

Use custom designed templates and offer various delivery options like digital dashboards, PDFs, or printed documents.

### Example

Think of your reports as a blockbuster movie. They should be engaging, easy to follow, and leave the client wanting more!



## 7 Embrace Continuous Improvement

Implement metrics to measure success, collect feedback, and track the impact of our advice.

### Example

Treat your firm like a top chef in a Michelin-starred restaurant, constantly refining recipes and techniques to deliver the best dining experience.



## 8 Learn from Every Goodbye

Record reasons for client departures, identify areas for improvement, and make changes to prevent future losses.

### Example

Think of client losses as a breakup. Reflect on what went wrong, learn from it, and use those lessons to build stronger relationships in the future.



## 9 Tackle Constraints Head-on

Overcome constraints with training, resource allocation, and a positive mindset.

### Example

Imagine you're an obstacle course racer. Identify the hurdles in your path and find creative ways to leap over them with style and grace.



## 10 Uphold Courteous Professionalism

Ensure all staff adhere to ethical guidelines, provide regular training, and promote a culture of honesty and transparency.

### Example

Picture yourself as a friendly butler, always professional, courteous, and ready to serve with a smile, making clients feel valued and respected.

