

I heard this from your clients!

I find people have the same goals at work and at home: to be more organized, productive and strategic, and more importantly to go through each day as easily and enjoyably as possible. Sometimes we're the provider and sometimes we're the client. I get to hear it from both perspectives.

I'll share some of the frustrations and wishes I hear fairly often so you can apply them to your client service practices. Surely you've said some of these yourself.

“She was very attentive before I became a client but now I rarely hear from her.”

Regular non-sales contact with your clients helps them feel less like just an income source for you, while providing an opportunity to listen for their cares and wishes. Do they need a referral to another professional in a related field? What free service can you provide that enhances what you already sell to them?

“I hate it when I call with a question and he reminds me I can find it on their website!” We know your intent is to empower your clients with easy access to information. Remember, though, that people tire of trying to remember passwords, portals and your programs. They often don't have easy web access due to travel or busy schedules. They hire us to make it ultra-easy for them, so walk them through the process while on the phone if they want a tutorial, or look up the answer for them.

“Do I need to save this or not?” Help your clients understand if they need to save your invoices, statements and other information. If they do, what's the reason? Like you, your clients get overwhelmed with information and paperwork and appreciate guidance. Remind them at year end they can toss their quarterly statements, or that you always provide insurance claim information at no charge. Don't promise it's available online, though, unless you're certain it's *permanently* available and they know how to access it.

“They told me they'd get back to me but I don't know when that will be.” Being specific verbally and with follow-up emails about what they can expect from you and when to expect it creates trust, if you do what you promised. Here's a suggestion: In your email signature or phone greeting add information about who to contact if you're not available and when they should expect a reply. It's always better to under promise and over deliver. What's your system for follow up reminders? If you don't have one, get one.

“We got a lot done but not what I really wanted.” We all have expectations. Sometimes we know what our clients expect and sometimes we don't. It's not that you didn't ask or they didn't tell you; this is more about what occurs to them after we asked. They often don't realize they wanted something until they notice they didn't get it. Ask often and allow a long pause for them to think about it.

“They went above and beyond....” Hopefully this is what they say when they refer you. You've exceeded their expectations not just once, but repeatedly.

Providing your clients with outstanding customer service means being aware of what bothered you about working with someone else and being sure you do even better.

