



Client-Centered Service Policy

The Firm's Client-Centered Service Policy is based on a recognition that what clients want most from their lawyers is care and concern. Often, satisfaction is based more on how the client is treated than the result obtained or the amount of the fee.

Part I General Principles

Lawyers and staff shall endeavor to give priority to the following principles in their client relationships:

- Representation of a client is an interactive process
- The lawyer and the entire staff must develop and consistently maintain a mindset that *it is all about the client*
- Clients should be treated as people, not files
- Responding to client contacts should be given priority
- Every client contact by all staff should project genuine concern for the client's issue

Part II Telephone Communications

Communications with the client should be regular and consistent with the expectations established with the client during intake. Responses to client initiated contacts should be prompt and meaningful.

- Client communication should meet the client's need and expectation
- Clients should receive information about significant events or changes promptly
- Communicating bad news should be a priority and should never be delayed
- Client telephone calls should be returned within two hours, and if that is impossible, a staff member should return the call to explain the delay and find a way to get help if there is a need for immediate attention
- Lawyers should return all calls on the same day, even if it means a return call during evening hours

Part III Correspondence

Written communication with the client may include traditional correspondence, faxes, or e-mail messages.

- Clients should receive copies of documents and pleadings, with a letter should the enclosure need explanation
- Clients should receive status reports monthly, unless some other arrangement has been made
- E-mail may be used for brief messages, but should not be used for confidential information or a significant communication

Part IV Communications through the Billing Process

The billing process is an excellent client communication tool.

- Time entries on itemized bills should avoid reciting mechanical functions and rather should be used to communicate substantive accomplishments and value provided.

Part V Managing Client Expectations

The client's expectations must be managed throughout the process.

- Any significant change in the course of a matter or a case plan must be shared with the client at the earliest possible time
- The case plan and any fee estimate should be easily accessible and referred to regularly during the course of a matter
- Lawyers and staff need to be familiar with the case plan and fee estimate as everyone needs to cooperate in managing a case within the parameters of the client's expectations
- At the time of monthly billing, the lawyer should refer to the fee estimate
- If the fee estimate cannot be met, the lawyer needs to adjust the matter in which the matter is handled or contact the client to discuss adjusting the amount of the estimate
- Contact a client in advance if a monthly bill is higher than the client expects, thereby being careful never to surprise a client with the amount of a bill

Part VI Recovery

If a client has a problem or becomes unhappy with some aspect of the service, the situation should be addressed as soon as possible so that the matter will not fester.

- If a client calls and leaves a message expressing unhappiness with some aspect of the service, the return of the phone call must have the highest priority
- Staff members who are aware of a telephone message in which a client expresses unhappiness with some aspect of the service must get word of the call to the lawyer ASAP (and not simply leave the message on the lawyer's desk)
- Never delay returning a call to a client who has left a message expressing unhappiness with any aspect of the service