

The Six Dimensions of Client Service

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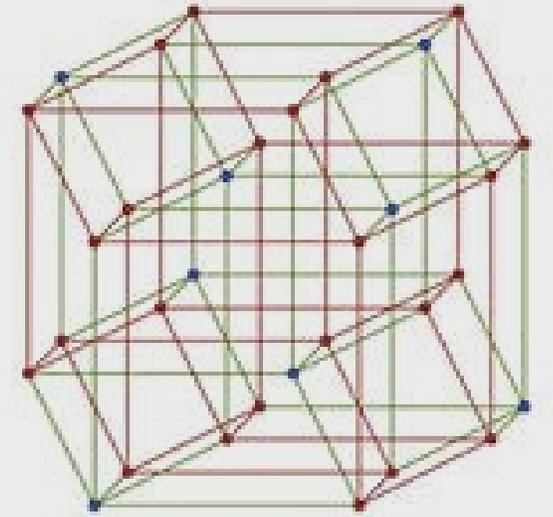
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A simple
thought
experiment.

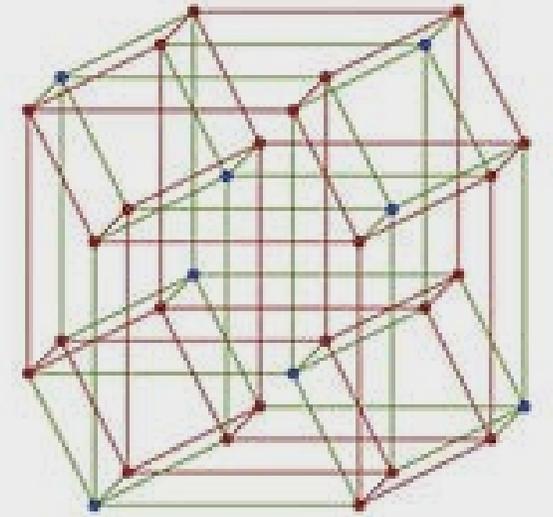
What would you
think in this situation?



A huge void in
our practice
literature.

We're all told to offer
great client service.

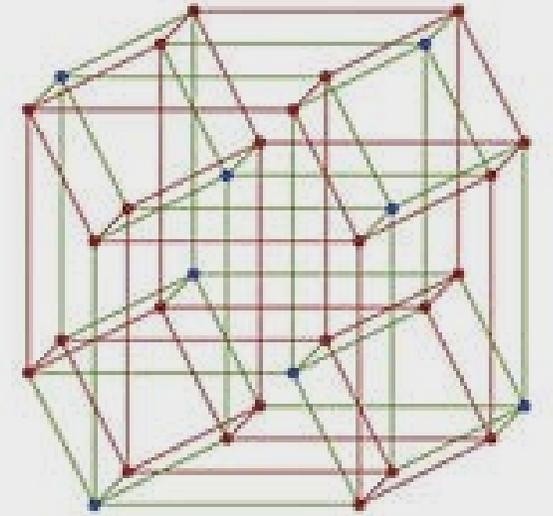
But... Are we ever told how to measure
it?



A huge void in
our practice
literature.

If you have no reliable way
to measure the quality of
your service, how can you assess it?

Or... know if you're improving it?



What IS great client service?

**Results of an
*Inside
Information*
reader survey:
an incredible
hodgepodge and
a lot of
suggestions.**

Returning calls promptly?

Accompanying clients to meetings
with attorneys?

Being honest in your client
dealings?

Handling requests promptly?

Offer fiduciary advice?

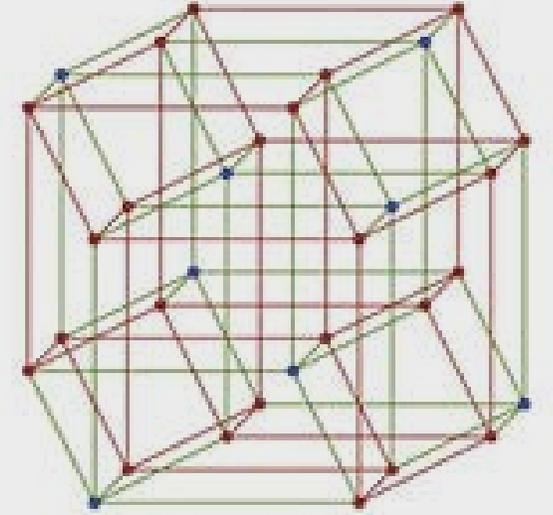
Client service
can be broken
down into six
distinct
categories

- 1) Setting clear expectations
- 2) Being responsive to client requests
- 3) Creating enjoyable interactions
- 4) Providing high-quality professional advice
- 5) Exhibiting exemplary conduct & character
- 6) Visibly caring about clients' well-being

1. Setting Clear Expectations

The Client Satisfaction
Formula:

$$\textit{Client Satisfaction} = \textit{Perception} - \textit{Expectations}$$



By setting
expectations,
you define
the standards
for satisfaction

This gives you a huge advantage in meeting client expectations — that you have set yourself.

When should clients expect a return call?

How often will you meet?

Practical Applications

If you tell clients up-front that you'll meet with them four times a year and you only schedule three meetings, they'll feel dissatisfied.

If you tell clients you'll meet with them twice a year, and schedule three meetings, you've exceeded expectations.

Practical Applications

If you tell a client you'll have an answer later in the day, and then get busy and won't be able to meet the expectation—

But what if you have somebody call the client immediately and reset the expectation.

The key: how well does the execution match the promise?

Be very
careful about
making
implicit
promises

If you return a prospect's phone calls promptly, and then, when the prospect becomes a client, you prioritize prospects over your client—

The client will feel like you reneged on an implicit promise to return calls promptly.

Can you
measure this?

The state-of-the-art is a package of “engagement standards,” delivered to the client upon signing the client agreement—which defines how you like to work with clients, what they can expect from you, and what you expect from them.

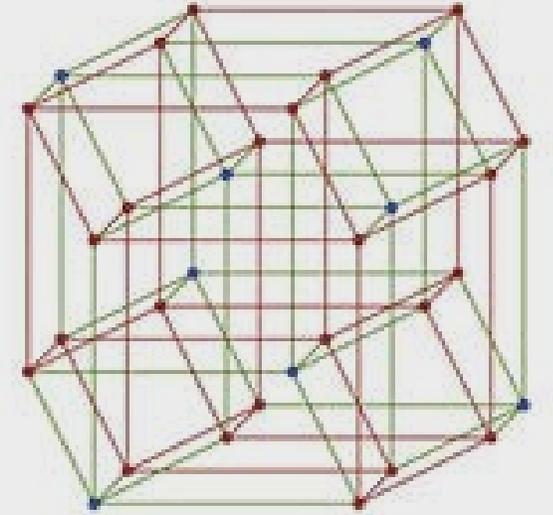


Constantly improve it.

2. Being Responsive to Client Requests and Messages

The Responsiveness
Formula:

*Clients value availability, compassion
and ability (expertise) in that order.*



Recognize that
clients
generally
cannot
evaluate your
expertise

Your willingness to respond promptly and 'caringly' is all they can evaluate about your service offering.

Practical Applications

Every point of contact matters. Your least-well-paid staffer may be your most important “ambassador” to clients and prospects.

Hire a people-person to answer the phone and watch client satisfaction go up dramatically.

Practical Applications

It's not enough to simply follow through promptly.

After a check request has been handled, have the service person update the client with a phone call and make sure it was received.

Later, ask if the client is satisfied with how it was handled. This will reinforce in his/her mind the quality of your service.

Practical Applications

During the onboarding process (when you are making a first impression) contact clients at inflection points.

“The assets have been successfully transferred. Would you like us to walk you through the performance statements?”

Practical Applications

Recognize that the pursuit of efficiency can be at cross-purposes with the pursuit of excellent client service.

The most efficient business operations would not include taking the (inefficient) time to contact clients at moments of potential uncertainty or after service requests have been met.

Practical Applications

With so many advancements in back office tech (and more coming with AI), some support staff time might be repurposed to making those calls and facilitating higher (less efficient) levels of client communication.

Can you
measure this?

Monitor and track how long it takes to return calls.

Monitor time required to handle check requests and other service opportunities.

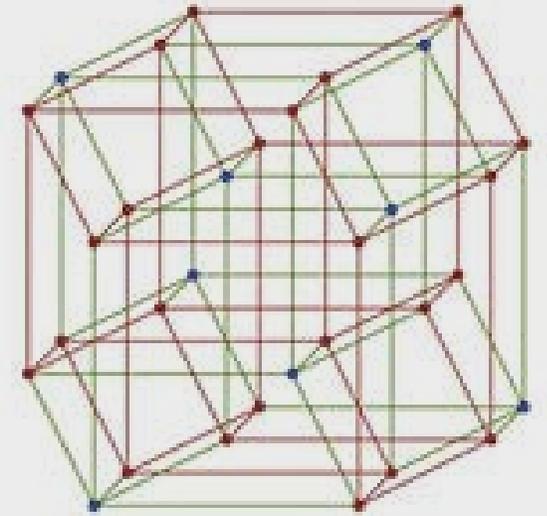
Schedule check-in communications as a matter of business routine.



3. Creating Pleasant Client Interactions

The Client Interaction
Formula:

*It is not so much WHAT YOU DO as
HOW YOU DO IT.*



The Car Dealership Story

HOW you provide the service tends to be remembered, but the actual quality of the service may never be understood or appreciated.

Remember:

Was the car fixed? Yes.

Would you ever go back? Never.

Practical Applications

Are clients greeted promptly when they enter the office or log onto remote calls? Or are they made to wait until you finish other tasks?

Do you prepare by reviewing personal information and prior communications (a more personal interaction)?

IMPORTANT: Do you communicate in jargonless English and understand the client's communication style preference? (Get to the bottom line; socialize first etc.)

Practical Applications

In-person meetings (do you still do them?) Research by K-State: Clients experience stress when sitting across a desk, or even in a conference room.

Better: meeting in a living room-like environment.

Practical Applications

A best practice: have routine meetings where everybody on staff talks about great customer experiences that they've encountered in their daily lives.

This brings in new ideas and reinforces to everyone the importance of world-class service.

Practical Applications

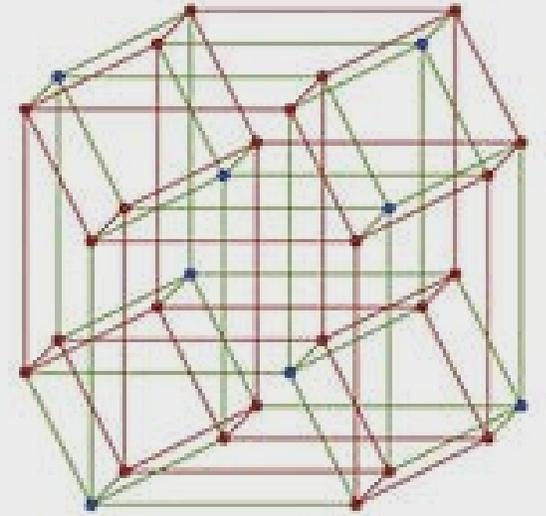
Create an internal culture, not of competition and efficiency, but of kindness and service.

One firm improved client service by creating a staff-first culture. A prioritized staff provides priority service.

4. Delivering High-Quality Professional Advice

The Advice Formula:

Know your stuff + know how to apply it + always give advice in the best interests of the client.



This is the
most
important
service for
professionals.

But always remember: it is also the
hardest for clients to evaluate.

Practical Applications

Create a collaborative (enjoyable) up-front planning process with an emphasis on client goals rather than the portfolio.

Proactively stay on top of client issues. (Estimated tax payments, mandatory distributions, future cash needs etc.) (Reach out to them before they feel the need to reach out to you.)

Continuously educate clients about inevitable market volatility.

Practical Applications

Out of the box planning services:

Helping with the loan application process on new home purchases.

Career/human capital asset management.

Netweaving. (!!)

Creating cash flow for vacation planning.

Can you
measure this?

Monitor whether clients are following (or not) your recommendations. (Are additional conversations needed?)

Maintain a culture of continuous learning. Encourage professional training, and require those who receive it to give internal presentations on what they learned.

Create a collaborative planning experience.

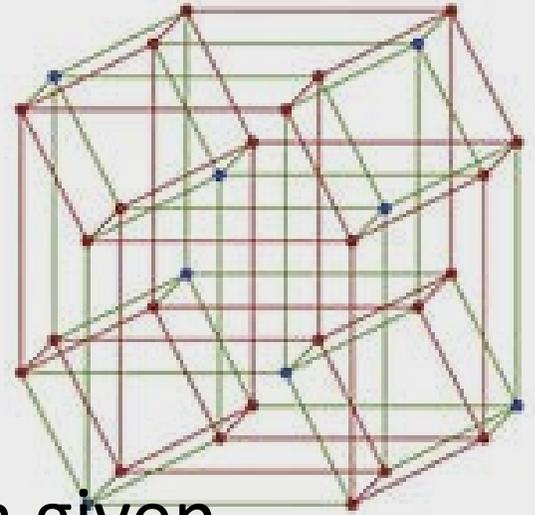


5. Exhibit Exemplary Conduct and Character

The fiduciary standard is just the beginning.

Being honest should be a given.

Create a culture where client progress toward goals is your firm's paramount goal. (Are you tracking client goals?)



Practical Applications

Mistakes happen. The formula for mitigating damage:

The cost of fixing a mistake increases dramatically over time.

Mistake mitigation is a huge process challenge.

Practical Applications

A proper apology:

- 1) Recognize the mistake and alert management.
- 2) Inform the client immediately.
- 3) Never make excuses. Propose solutions that will make the client whole.
- 4) Meet with the client and go over what happened and show how you plan to prevent this from happening again.

Can you
measure this?

Create an internal system for reporting errors.

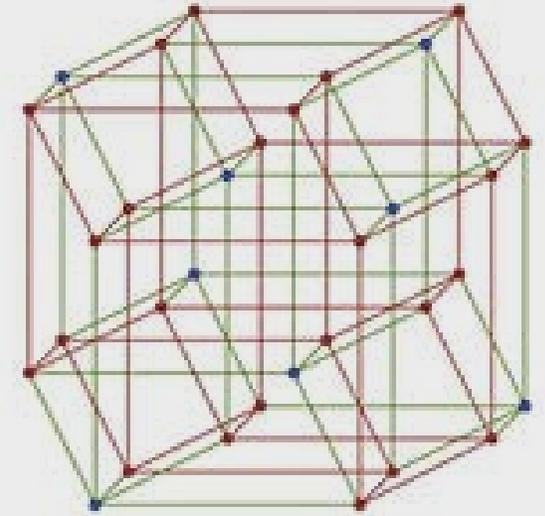
Create error-checking processes for all client outputs.

Train staff in Proper Apology procedures.



6. Visibly Care About Clients and Their Welfare

This is the differentiator
between satisfied
and “engaged” clients.



It may also be the key to referrals.
100% of referrals come from engaged
clients.

There is no known way to fake this.

Practical Applications

This means a “more than business” relationship with clients. It crosses boundaries.

Some clients might be uncomfortable with this. Proceed gradually.

Practical Applications

“Active listening”

Celebrating client milestones.

Inquiring about family and personal situation in each meeting.

Try to connect what you learn with opportunities to provide advice and service.

Practical Applications

Your CRM makes it possible to “remember” personal details (children, dogs, aging parents, recent vacations) for 100 clients—which would be impossible otherwise.

Coach clients on personal goals.

Can you
measure this?

You can measure your touchpoints
with clients.

Celebrate milestones and wins.

Are you invited to clients' childrens'
weddings? To personal celebrations?



As you unravel the different components, you'll see opportunities for improvement.

How will you change in each component?

- Define appropriate metrics and track results over time.

Collect client feedback on what aspects of your service they most value.

- **RECOGNIZE** that clients will not be able to assess the quality of your advice.

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Inside Information
<http://www.bobveres.com>

Questions?
Comments?
Angry
feedback?

