

RDA CORPORATE COMMUNIQUE...

ROBERT DENNEY Associates, Inc.

Management, Marketing, Strategic Planning

January, 2018

WHAT CLIENTS SHOULD EXPECT FROM THEIR LAWYERS AND ACCOUNTANTS

In the course of our work with law and accounting firms, we continually see that many of their clients are dissatisfied with either their service or their work – or both. Yet, in the course of my role as an outside director or advisor to privately head companies and non-profit organizations, I find that some of them do not really know what they should expect from their lawyers and accountants.

Therefore, as a service to these companies and organizations, here is a check list.

- **Lower Fees.**
- **Asking for your feedback on their work and service.**
- **Understanding your situation, operations and plans.**
- **Solutions to problems.** Getting you out of trouble.
- **Money.** Ways to save it, make it and keep it.
- **Expertise in the particular area(s) where you need their assistance.**
- **Knowledge of, and expertise in, your industry or field.**
- **Attention.** You should feel that you are their most important client.
- **Communication.** Only bats and mushrooms like to be kept in the dark.
- **To be involved in how they handle your matters.**
- **Timeliness.** They should meet all necessary deadlines but beat your deadlines.
- **Courtesy and respect.** To be treated as a person, not just a file. This applies to all your personnel, not just you.

- **No surprises.** They should tell you what will happen and prepare you for what might happen. Furthermore, they should never exceed the agreed upon or projected fee without first discussing it with you and obtaining your approval.
- **Prompt and understandable billing.** This helps you plan your cash flow. Furthermore, your memory is fresh on what they have done and you will have fewer, if any questions.
- **Prompt answers.** To your questions – and to any complaints you may have.
- **Guidance and advice.** On what you must or should do. You can't read their minds and you shouldn't have to try.
- **Responsiveness.** Regards of what they may think, if you feel something is important then they should realize that it is important.
- **Advocacy.** They should never forget that they were retained to represent or protect you and your interests.
- **A deal maker, not a deal breaker.** If they must disagree with you on something, in most cases they should say, "No, but..." or "Yes, if...".
- **Follow through.** They should always do what they say they will do – and when they say they will do it.
- **To know who else can assist you or answer your questions if you your principal contact is not available.**
- **Non-billable time.** You should not feel that the meter is always running,

Remember, there are other good lawyers and accountants who can do what they do. If they are not meeting all your expectations, as listed above, you should consider finding someone else. There are other professionals who do recognize their clients' expectations and meet them.

Bob Denney

Bob Denney serves as an outside Director and has also served as an interim CEO in turnaround and crisis situations. For further information visit our website at www.robertdenney.com

154 Chandler Drive, West Chester, PA 19380
Office: 610-431-2077 Cell: 610-804-7850