



Client Charters

An effective tool to establish and maintain trust between you and your client.



The power of client charters in building client trust

Date: Wednesday October 23, 2024

Trust, and for that matter accountability, is the cornerstone of any professional relationship. Without their trust in your ability to deliver on what you say you can deliver, your clients will, eventually, walk away.

A client charter is one of the most effective tools for [establishing and maintaining trust](#) between you and your client.

What is a client charter?

A client charter is a document that establishes the clear expectations and defines the mutual responsibilities of both the professional service provider and its client. It ensures that all parties are aligned to the short, medium and long-time goals/objectives, service levels, and performance benchmarks.

Unlike Service Level Agreements, client charters are unique to the needs and circumstances of each individual client.

4 key components of a client charter?

While each client charter is bespoke to the needs of that client, client charters often include:

Introduction and purpose: explains why the charter exists and what its aims are. This could be ensuring client satisfaction or demonstrating your commitment to a high-quality service.

Service standards: specifies the levels of service that the client can expect. This should include response times, the quality of your service, how client feedback will be handled, your overall availability, and the client's preferred method of communication.

Client's rights and responsibilities: makes it clear what clients can expect from you, but also what is expected from them.

This helps to create a balanced relationship where both parties are responsible for the overall success of the relationship.

Feedback and complaints procedure: include a section on how clients can provide feedback and how complaints will be handled. This is crucial in demonstrating accountability.

While ensuring the client charter captures the [core values of the relationship](#), keep in mind that the aim of the charter is to serve as evidence of the commitment the service provider is willing to give the customer and the commitment the customer is willing to invest in the service provider.

In other words, a client charter is not all 'one-way' traffic.

Benefits of a client charter

A well-written client charter offers several key benefits, both to the service provider and their client.

Helps build trust

When clients understand the level of service they can expect, it creates transparency, which fosters trust. As previously mentioned, without the trust of your client, your relationship will not stand the test of time!

A well written client charter ensures that promises are made and kept, reducing the likelihood of a misunderstanding or unmet expectations.

It should also provide an avenue for discussing any concerns with the way the matter is being managed, helping to bring about early resolution of any resentment. Again, this should help build trust and ensure [client stickiness](#).

Improves accountability

Importantly a client charter serves as a benchmark for clients to measure their service provider's performance. This clear, transparent means of assessing performance (KPIs) ensures everyone is on the same page when it comes to evaluating the product that is produced - no surprises!

Enhances the client experience

A well-documented client charter provides real evidence that your firm is committed to customer service/client experience (CX). Unlike many of your competitors who will pay lip-service to their client commitment, you will have your commitment set down on paper!

In turn, this provides your client with a clear and transparent understanding of how they will be treated by you and your firm, which in turn should reassure them that their needs are a priority to you.

The charter should also help provide your client with a sense of security, knowing that you will always be putting their interests first.

Differentiate your business

Frankly, adopting and applying client charters will differentiate your firm from all the others!

Every firm talks about putting the client first, but you will be walking the talk and not many firms do that!

Final thoughts

Once you have settled your client charter make sure to share it far and wide within your firm and not just with the client team. It is important that everyone within your firm understands the commitment that the firm has made to its clients and helps to deliver on that commitment.

By clearly setting expectations and consistently delivering on them, your firm will strengthen its client relationships and stand out from the pack!

The information contained in this article is of general nature and should not be construed as legal advice. If you require further information, advice or assistance for your specific circumstances, please contact us.