

Prevention in professional liability

Customer service self-assessment questionnaire

Customer relationships

	Yes	No
I treat my clients with respect:	<input type="checkbox"/>	<input type="checkbox"/>
• I listen to them		
• I am accessible		
• I am honest		
• I communicate regularly with them		
• I take the time to answer questions		
• I am patient and courteous		
I manage my agenda and make appointments so that customers do not have to wait until I have enough time to answer questions	<input type="checkbox"/>	<input type="checkbox"/>
I make the effort to use clear and concise terms, avoiding legal jargon	<input type="checkbox"/>	<input type="checkbox"/>
I send the client a copy of the correspondence, the procedures and any other important documents in the file, with an explanatory note as to their meaning	<input type="checkbox"/>	<input type="checkbox"/>
I, or a member of my team, return all phone calls on the same day	<input type="checkbox"/>	<input type="checkbox"/>
I keep the client regularly informed of the progress of his file	<input type="checkbox"/>	<input type="checkbox"/>
I confirm to the client in writing:		
a) my acceptance of the mandate, including a description of the mandate and the steps that have to be completed	<input type="checkbox"/>	<input type="checkbox"/>
b) my refusal of the mandate and the possibility that urgent procedures may be required	<input type="checkbox"/>	<input type="checkbox"/>
c) the fee agreement	<input type="checkbox"/>	<input type="checkbox"/>
d) the instructions received	<input type="checkbox"/>	<input type="checkbox"/>
e) any changes or updates to the instructions received	<input type="checkbox"/>	<input type="checkbox"/>
f) my opinions and recommendations	<input type="checkbox"/>	<input type="checkbox"/>
g) the important decisions regarding the case	<input type="checkbox"/>	<input type="checkbox"/>
h) my client's refusal to follow my advice	<input type="checkbox"/>	<input type="checkbox"/>
i) the end of the mandate, even due to non-payment of my fees or court fees	<input type="checkbox"/>	<input type="checkbox"/>
I send my client regular detailed invoices	<input type="checkbox"/>	<input type="checkbox"/>