

Spelling it out - customer care letters

New duties in the SRA Standards and Regulations (launched on 25 November 2019) make today a good day for every solicitor to review the [SRA's Guidance for Client care letters](#). The aim is to improve the customer's experience by giving them easy to understand information and reduce the opportunity for misunderstandings as the relationship progresses.

Peter Kinch previously discussed using [Better Engagement Letters](#) to improve customer relationships by providing clarity and using simple language when communicating with clients, all of which is now enshrined in the SRA's Guidance. Ensuring there is a clear understanding between lawyers and clients from the outset of a matter reduces the likelihood of painful conversations as matters progress - cost overruns, scope creep, "I thought we were getting..." etc.

However, producing client care letters needn't be a regulatory SRA 'tick box' exercise. Instead lawyers should view them as a real opportunity to impress clients by using proven Legal Project Management (LPM) practices to transform client care letters into genuinely useful project documents.

What is this LPM magic?

Sound LPM disciplines provide lawyers with the foundations to support strong and lasting client relationships. Where everyone knows what is to be done, when, by whom, in what sequence, and at what overall cost the chance of complaints, queried bills and, worse still, write-offs is much reduced.

Client care letters can be used to capture matter objectives, client benefits, project scope as well as setting out key team members, actions and responsibilities, and budgets... all project management 101. Having a clear project definition included in the client care letter reduces misunderstandings and provides a useful point of reference - for lawyers and clients - to keep the client's commercial objectives and expected outputs front and centre.

Effort spent planning, scoping, and communicating objectives and expectations at the outset in client care letters will produce dividends and help lawyers meet their new SRA obligations.

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