

OPEN TO WILL WRITERS, TRUST, ESTATE PLANNING AND PROBATE PRACTITIONERS AND SOLICITORS

Customer Service Champions

We are all committed to doing the best for our clients and acting in their best interests. But which firm goes above and beyond? Who can demonstrate customer service excellence? Who has embedded a culture of “delighting” their customers? And who can provide an evidence-based assessment of what it means to their clients to go the extra mile?

Criteria

This individual must demonstrate over the last 12 months:

- evidence individual and team skills, expertise and understanding of the areas of wills, probate, tax, trusts and/or estate planning
- demonstrate how they have operated in the best interests of the client and the profession whilst managing expectations
- show how they have embedded a culture of customer service excellence
- demonstrate how they excel at dealing with service issues or complaints which may arise
- provide examples or case studies of real-life situations where they have overcome obstacles to delight their clients