

What to Include in Your Client Service Agreement



Frequency of face-to-face and telephone contact



The standard client education initiatives for a year



Outline of your solutions



The education initiatives you will take for professional growth



Your response time for client inquiries, calls and requests



An explanation on how you will ask for client feedback



Your problem resolution time in the event of an error



Your client's commitment to:

- Full disclosure regarding life-changing events so you can assist them
- Dedication to the plan



Your team (internal and external) and their responsibilities

