# CSE CHECKLIST – "CARE FOR NEW CUSTOMERS"

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| ☐ | **Be deliberate with new clients.** Don't get lost in the processes that are second nature to you and forget that every aspect of this new relationship needs to be explained to the client. |
| ☐ | **Respect clients' internal processes.** You need to mold the account structure to meet their demands, not the other way around. |
| ☐ | **Consider creating a new-client manual**<br>○ Include contact information<br>○ Details about your firm<br>○ Standard processes<br>    ▪ Forms, procedures<br>    ▪ Online resources<br>    ▪ How clients can register complaints<br>    ▪ After-hours access information<br>○ FAQ<br>○ Corporate philosophy/approach to risk |
| ☐ | **Assign an individual the responsibility for overseeing the new client relationship.** This person will not to handle all communication but will ensure that the new account is off to a smooth start and all contact points are established based on areas of responsibility. |
| ☐ | **Monitor the client's comfort level with processes and agency staff.** This — not the calendar — should dictate when a client transitions from "new" to "established." |
| ☐ | **Take steps to continually evolve customer care, as good customer care should never end.** Even established clients deserve ongoing, dedicated oversight. |


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