Par Me Martine Gervais, conseillère au Bureau du syndic

A little prevention

In addition to your expertise and know-how, the quality of the relationship that you cultivate with your clients is an important part of the professional and disciplinary health of your practice. By following the rules below, you will meet your clients' expectations and avoid creating situations that result in dissatisfaction and complaints.

SELECT YOUR CLIENTELE; CONFIRM YOUR MANDATE AND ITS SCOPE

- Estimate the amount of your fees as precisely as possible and inform your client.
- If you accept a mandate from a friend or family member, be careful and set the terms and conditions of this relationship from the very start. It will need to stay professional and comply with the same body of standards as the relationships you establish with your other clients.
- If you are the umpteenth engineer that a potential client has consulted for the same project or if the project is already in progress, ask questions about the specific circumstances of the project before agreeing to continue or take over the mandate.

IF YOU HAD TO FOLLOW JUST ONE RULE: KEEP RECORDS – TAKE NOTES, PUT IT IN WRITING AND CONFIRM. AND REMEMBER, AN OUNCE OF PREVENTION IS WORTH A POUND OF CURE!

- For each new project, ask yourself: Do I have sufficient knowledge to properly complete this project and do I have the time?
- Confirm the mandate, its scope, its specificities and its exclusions in writing, including the terms and conditions for billing and paying the fees as well as the work schedule. Make sure that your clients actually understand every detail.

KEEP YOUR CLIENTS INFORMED

- Inform your clients of changes in the scope of the mandate and the impact of these changes on the fees and the schedule.
- Return your clients' calls, answer their requests and confirm the content of your conversations in writing.
- Patiently explain your fees and your work in clear language.
- When clients do not take your opinion into consideration, send them a written notice of the potential consequences, including the fact that you may decide to stop working for them.

MANAGE THE END OF THE MANDATE

- Confirm the end of the mandate with a letter to the client concerned.
- Confirm that your fees were paid in full or remind the client that there is still a balance owing, as applicable.
- Provide your client with a list of the documents that you will return to him or her, a list of the documents that you will give to him or her as well as their subject, and confirm the period of time that you will keep a record of them, i.e. a minimum of 10 years.

Finally, if you had to follow just one rule: Keep a record of the mandate: Keep notes, put it in writing and confirm. And remember, an ounce of prevention is worth a pound of cure!