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JOINT PRESS RELEASE

Research shows room for improvement on Client Care Letters

New research commissioned by legal regulators and the Legal Services Consumer Panel (LSCP) has identified principles to help legal services providers better communicate with their clients.

Client Care Letters are required of all regulated professionals providing legal services.

The independent researchers have recommended eight key principles for preparing effective Client Care Letters. They are:

1. Show a clear purpose
2. Keep it concise
3. Put it in plain English
4. Prioritise information
5. Personalise information
6. Make it easy to read
7. Highlight key information
8. Consider additional opportunities to engage clients

These principles have been developed by the independent researcher Optimisa following the 'Research into Client Care Letters' report commissioned by the regulators and LSCP. The findings, published today, show that Client Care Letters are often not as effective as they should be, in making sure that clients understand the work that is being carried out on their behalf, or in outlining what is required of them.

The individual regulators will take account of these principles and the more detailed findings from the research to inform their work with the professionals that they regulate.

Welcoming the initiative, the **Chair of the Legal Services Consumer Panel, Elisabeth Davies said:** *"Client Care Letters are mostly ineffective at conveying the information consumers prioritise, such as information on cost, timescales, and basic client-relation contact details. Worryingly, the research also shows that Client Care Letters do not meet the needs of vulnerable consumers. There is an urgent need for Approved Regulators to rise to the challenge of supporting providers to deliver improved communication to consumers. We will continue to work with Approved Regulators on this agenda. The findings of this research must now inform a well-considered and targeted approach to addressing the communication needs of consumers, vulnerable consumers included."*

[You can read 'Research into Client Care Letters' report here.](#)

Notes for editors

About the research

The 'Research into Client Care Letters' report was carried out on behalf of the consortium by Optimisa over the summer of 2016.

About the eight key principles to improve Client Care Letters

1. **Show a clear purpose** – provide the purpose of the letter and the importance of reading it, upfront;
2. **Keep it concise** – recognise that the ideal length is 1-2 pages. If this is not feasible, use short sentences, bullet points and headings to break the information up;
3. **Put it in plain English** – avoid using legal terms, archaic or complex language. Minimise the use of vague and / or heavily caveated sentences;
4. **Prioritise information** – focus on the information which is perceived to be most relevant to the consumer and ensure a logical flow;
5. **Personalise information** – provide details on the consumer's specific case, for example their estimated costs and not general estimated costs. Tailor the letter so that irrelevant information is excluded. Use personal pronouns so it is clear you are talking to the individual;
6. **Make it easy to read** – Use line spacing and a large font size (minimum size 12). Use headings to make the letter easy to navigate and avoid dense paragraphs;
7. **Highlight key information** – Use visual tools such as bold text, headers, summary boxes, tables or diagrams, to make it easier for consumers to pick out key points; and
8. **Consider additional opportunities to engage clients** – Finally, while there should be a clear reference to the complaints procedure in the Client Care Letters, consider whether more detailed coverage is better delivered in separate leaflets; or whether reminders could be sent later on in the legal process, to ensure that this information was understood.

About the Legal Services Consumer Panel

The Legal Services Consumer Panel was created by the Legal Services Act 2007 and started work on 1 November 2009. The Panel is an independent arm of the Legal Services Board and is made up of eight lay members whose appointments were approved by the Lord Chancellor.

About the frontline legal services regulators

- Bar Standards Board regulates barristers and specialised legal services businesses
- CILEx Regulation regulates Chartered Legal Executives
- Solicitors Regulation Authority regulates solicitors and specialised legal services businesses
- Costs Lawyer Standards Board regulates Costs Lawyers
- Intellectual Property Regulation Board regulates patent attorneys and trade mark attorneys
- Institute of Chartered Accountants of England and Wales (ICAEW) regulates chartered accountants, probate practitioners and alternative business structures
- The Master of the Faculties regulates Notaries Public
- The Council for Licensed Conveyancers is the specialist Property Law regulator

All are public interest regulators in England and Wales.

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