



### SESSION 4

#### **Working Successfully with Professional Service Advisors: Expectations, Tips and Questions You Should Never Be Afraid to Ask**



#### **1. The religious institute must lay out clear expectations for professional service advisors with whom it chooses to work, including expectations regarding:**

- a. The timeliness of the professional advisor's responsiveness to the institute's needs and requests that arise during the course of the institute's work with the professional advisor
- b. Open, honest and full communications, including the institute's expectation that "the best surprise is no surprise"



#### **2. Some tips that can be useful in working with professional advisors are:**

- a. Remember the professional advisor works for the religious institute
- b. Express any dissatisfaction explicitly. Good advisors are driven by a high level of client satisfaction and understand the consequences of having unsatisfied clients
- c. If a professional advisor gives a reason for concern, raise this concern immediately and without hesitation
- d. When issues or problems arise, ask repeatedly what the advisor's experience has been with similar issues or problems



#### **3. Here are some questions you should never hesitate to ask a professional advisor**

- Is the work you are doing for us on schedule?
- Are there areas in which you foresee potential issues or problems?
- Are our actions in any way inhibiting your ability to do the work we require of you?
- Is the work you are doing for us within budget?
- In what areas do you have the most concern at the moment?
- Is there anything we don't know about the work you are doing with us that we need to know?

