
Case Study: Retaining Clients at Meridian Notarial Services

Background

Meridian Notarial Services is a reputable firm offering document authentication, certification, property transfer witnessing, and corporate notarisation. The firm has built its reputation on accuracy, confidentiality, and compliance with legal standards.

Over the past year, however, the firm has noticed a **decline in repeat clients**, especially among small businesses and international clients who previously relied on Meridian for ongoing notarisation needs.

Key Characters

- **Clara**, Senior Notary and Client Relationship Lead
 - **Evan**, Junior Notary
 - **Mr. Rossi**, Owner of a small import–export business
 - **GlobalTech Ltd**, a corporate client requiring frequent notarisation for cross-border transactions
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The Situation

1. Declining Repeat Business

Data shows that repeat visits from small business clients have dropped by 25%. Feedback:

- Long waiting times
- Inconsistent communication about required documents
- Limited appointment availability
- A perception that the firm is “transactional rather than relationship-focused”

2. A Critical Incident

Mr. Rossi arrives for a scheduled notarisation of shipping documents. When he arrives:

- Evan informs him that one document is missing a required apostille.
- Mr. Rossi insists he asked in advance what was needed and was told “everything is fine.”
- The notarisation cannot proceed, causing a delay in his shipment.

Mr. Rossi leaves frustrated, saying:

“I’ve been coming here for years, but lately it feels like you don’t care whether I return.”

3. Corporate Client Concerns

GlobalTech's legal team emails Clara:

- They appreciate the accuracy of the work
- But they are considering switching to a competitor offering:
 - A dedicated account manager
 - Faster turnaround
 - Digital reminders for upcoming notarisation deadlines

They request a meeting to “discuss service expectations moving forward.”

4. Internal Challenges

- Clara is overloaded and struggles to maintain personalised communication.
- Evan is technically competent but inexperienced in client management.
- The firm has no CRM system, relying on manual notes and email chains.
- Staff focus heavily on compliance but less on the client experience.

Meridian now faces a risk: **excellent technical service but declining customer loyalty.**

Questions

1. What customer service issues are affecting client retention?

2. How should Clara respond to Mr. Rossi's frustration?

3. What steps can Meridian take to improve customer retention?

4. What indicators would show that customer retention is improving?

5. How can the firm balance legal accuracy with a more customer-friendly experience?