



2025 NAMFS Leadership Summit – Executive Brief

Session: Client Expectations & Relationships

Key Points

Communication and Expectation Alignment

The most significant source of friction between clients and field providers arises from misaligned expectations, particularly regarding timelines, communication, and deliverable clarity. Breakdowns occur when offshore or back-office teams lack field awareness, leading to redundant work and frustration. Clear, initiative-taking, and consistent communication including bid responses, delay notices, and explanations of on-site challenges is the foundation for maintaining trust and collaboration.

System and Process Limitations

Current servicer software systems often transmit incomplete data or restrict comment entry, creating disconnects between what occurs in the field and what clients see. Participants emphasized the need for education and direct engagement between servicers and vendors to bridge these gaps, reducing reliance on flawed automated systems.

Realistic Service Levels and Industry Shifts

Over one-third of current preservation work occurs in remote or rural areas, a substantial increase from a decade ago. Historic 24–48-hour turnaround standards are no longer feasible given lower volumes, extended drive times, and workforce shortages. Participants agreed that Service Level Agreements (SLAs) and client expectations must evolve to reflect today's operational realities.

Safety and Field Realities

Safety concerns continue to escalate due to stringent and sometimes unreasonable client requirements, including unsafe photo demands and intrusive documentation practices. The session reaffirmed that safety must take precedence over procedural compliance. Proposed alternatives include verified exterior photos, use of technology for remote validation, and stronger servicer awareness of field-level risks.



Transparency, Accountability, and Technology

Transparency was identified as the cornerstone of client trust. Admitting mistakes, explaining corrective actions, and maintaining open communication channels are essential to long-term partnerships. Technology should be used to enhance accountability and safety, not obscure reality. Participants cautioned against unethical uses of AI or photo manipulation.

Capacity Constraints and Market Pressures

Vendors are facing capacity strain, longer turnaround times, and financial pressure due to reduced volume and static pricing. Declining photo quality and incomplete inspections are early warning signs of overextension. The discussion emphasized honest capacity reporting, fair compensation, and workload balancing to preserve quality and integrity.

Partnership over Transaction

The defining difference between a vendor and a trusted partner lies in education, engagement, honesty, and collaboration. Fear of losing business must not override transparency or integrity. Stronger partnerships are built through mutual understanding, shared accountability, and open dialogue, not punitive or fear-based practices.

Next Steps

Revise SLAs and Performance Metrics

Update service expectations to reflect rural coverage realities and labor conditions. Encourage flexibility in turnaround standards and penalties.

Enhance Communication Standards

Standardized vendor-to-servicer reporting formats and escalation channels. Establish clear guidelines for delay reporting, bid revisions, and safety incident communication.

Implement Safety-Focused Best Practices

Develop a NAMFS-endorsed Safety Protocol Framework distinguishing general and situational risks.



Prohibit unsafe verification practices and outline acceptable photo alternatives. Promote uniform visibility gear, branded apparel, and paired inspections where warranted.

Strengthening Transparency and Accountability

Introduce a Transparency Charter for servicers and vendors, promoting disclosure of risks and data limitations. Encourage technology-driven solutions for live property flagging and safety alerts, while safeguarding accuracy.

Address Capacity and Financial Viability

Create standardized capacity reporting tools for vendors. Advocate for pricing reviews that align compensation with safety and quality standards.

Advance Client Education and Engagement

Launch a Client Education Initiative to align servicer expectations with field realities. Offer webinars, toolkits, and best practice briefings focused on communication, safety, and risk management.

Institutionalize Safety Leadership and Training

Empower the NAMFS Safety Subcommittee to publish training modules, host workshops, and expand awareness programs. Explore the development of a Safety Grant and Waiver System for high-risk property inspections.

Summary Statement

The session reaffirmed that communication, safety, and transparency are the foundations of lasting client-provider relationships. As the field environment evolves with more remote properties, tighter



labor markets and rising safety risks. NAMFS and its members must champion practical reform: realistic SLAs, ethical use of technology, initiative-taking communication, and unwavering commitment to safety. Better expectations lead to better outcomes and stronger partnerships.