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Service Strategy

Technology-enabled Solutions Enhance Communication, Collaboration, Self-Service

Nov. 09, 2010

ORLANDO, Florida – Client retention is a top concern for CPA firms and missed opportunities to create stronger client connections can be costly. At the same time, firms are reducing staff due to economic pressure. So how can firms improve client service, while staff resources decline?

Today, over 1,000 attendees of the annual CCH User Conference, CCH Connections, heard about ways to improve client retention, including an address from industry leader Wolters Kluwer Tax & Accounting CEO Kevin Robert. CCH, a Wolters Kluwer business (CCHGroup.com)

is part of Wolters Kluwer Tax & Accounting, the global leading provider of tax, accounting and audit information, software and services.

“Today, your clients’ service expectations are being driven in part by their consumer-based service experiences – whether it’s what they can do on their iPhone, or how they conduct business with their bank online,” said Robert. “They expect you to be closely connected to them, and they want you to be available anywhere, anytime.”

Finding new ways to keep clients satisfied must be at the center of every firm’s strategy, and one way to do this is to connect more successfully with clients by optimizing firms’ top investments: both technology and people. Although many firms are reducing staff size by necessity, firms can also leverage technology to create new connections with clients, while staff focuses on high-value client work.

“As you think about your clients in today’s environment, ask yourself

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“Firms may be using several of these channels today, but are you making the best strategic use of each to create a full-service approach?” Robert asked. “Your people are your greatest assets. But are they spending their time on what delivers the highest value to existing clients, and what helps bring in new ones?”

Creating a Technology-enabled Self-Service Strategy

Robert encouraged firms to optimize technology such as websites and portals to enable a successful self-service strategy, that ensures firm staff can focus on high-value work, while clients get fast access to information and answers they need.

“Portals can be a seamless extension of your firm’s website and offer an exceptional new level of service for your clients, creating an entirely new opportunity for connecting and collaborating,” said Robert.

As part of its new suite of SaaS solutions, CCH offers ProSystem *fx* Portal for firms. Portal offers an easy, convenient and highly secure way to access information, documents and applications, exchange data and share information, around the clock. It’s 24/7 service – and introduces to clients levels of access and control that they’ve never had related to accounting services before.

“Customers are adopting ProSystem *fx* Portal at a very rapid rate, in fact the fastest I’ve ever seen for any new solution. It’s clear that firms and their clients are realizing significant and immediate benefits from working in this new way,” said Robert.

“Firms should challenge themselves to refresh their service channels

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information, technology-based self-service delivery touch points will become an even more important part of shaping the client experience.”

To help firms better understand what clients want and how they can leverage technology to serve them, Robert announced a new initiative by CCH to create an Innovation Lab where CCH will partner with customers, working side-by-side with them and their clients. The initiative is an extension of the Contextual Design process that CCH already has in place to work closely with customers in the workplace to observe workflows.

“We’re seeking volunteer firms to participate in this new innovation lab with their clients,” said Robert. “Under this initiative, CCH will work directly with firms and their clients so that CCH can even better understand what clients want and what the next wave of connectivity and collaboration tools need to be.”

Video of the address by Wolters Kluwer Tax & Accounting CEO Kevin Robert is [available here](#).

About CCH, a Wolters Kluwer business

CCH, a Wolters Kluwer business (CCHGroup.com) is the leading global provider of tax, accounting and audit information, software and services. It has served tax, accounting and business professionals since 1913. Among its market-leading solutions are The ProSystem *fx* Suite, CorpSystem, CCH IntelliConnect, Accounting Research Manager and the U.S. Master Tax Guide. CCH is based in Riverwoods, Ill. Wolters Kluwer

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