CPA

Practice **Advisor**

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is probably tired of one of my recurring themes. I know I am ... I am as tired of writing about it as John Irving is of writing about passing open windows!

However, there's still room for growth, so I am once again on my soapbox about CPA firm client service. I was watching CBS Sunday Morning on July 2; the cover story was about customer service call centers, and while it was kind of a tongue-in-cheek summation of how companies need to pay more attention to customer service, it nonetheless struck a chord with me in how the same concepts apply to CPA firms.

It's not entirely hopeless! Sure, there are many, many firms that get this right, beginning with the initial call to the receptionist all the way to the managing partner personally reaching out to talk with the firm's clients. Yet, even in a firm that preaches client service, I think there's still something to learn.

How can we do that? Here are three recommendations, none of which are original, but still apply to most, if not all, CPA firms:

Focus on solutions for the client instead of telling the client how great you are. Most firms only talk about what THEY can do instead of discussing issues more pertinent – and bottom-line oriented – to the client. I see this all the time in firm brochures and website copy. If a firm were to zero in on what the client needs, then I guarantee you will see increase client retention and even more prospect conversions.

Stick with the personal touch. This one gets to the basics of great communication.

Most clients will sincerely appreciate a phone call on a semi-regular basis instead of a random e-mail. Turn the clock off; now is not the time to charge for the call.

Instead, ask about the client's business and even his or her personal life, if applicable. This is a an important call for even the newest accountant or CPA. You can't underestimate the importance of a phone call. Better yet, schedule a time to meet in person, either for lunch or coffee. Make it clear you don't have a set agenda.

Remember: you're want to be thought of as a business partner.

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