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Darren Root, CPA, CITP, CGMA • Sep. 30, 2013

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Recently I had a fellow CPA visit our firm in Bloomington, Indiana. We spent a few hours talking about processes, growth, the importance of websites, and staffing...all good stuff. Before he left our visitor told me, "Your office has a really comfortable feeling to it, when I walked in it just felt right." He also mentioned that the signage outside our office was consistent with the brand inside the office and our landscaping was well-maintained.

In addition, he was impressed by our customer service host. She welcomed him by name and made sure he was seated comfortably in our conference room with his preferred choice of beverage. (She knew what he wanted to drink without asking him because she had taken the time to call ahead to his office and ask his staff.)

I provide this example, not because I want to brag about our office, but to make a point: the look and feel of your office and the level of customer service you offer have a huge impact on the way you and your firm are perceived. What the visitor to our firm was really referring to was the effect of these intangibles—an overall impression he couldn't quite put his finger on—that make up the essence of our firm.

Cultivating the right physical environment and firm service culture is like wearing a great suit. A nice suit looks professional, fits well, and makes you feel good in it—which in turn makes you feel confident and ready to excel at the job at hand. It's the

same with your firm. Your brand, your office environment, and your customer

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time to look at having your logo professionally redesigned to reflect your firm accurately.

2. **Firm Website** – Is your website a place for your clients to do business with you? Does it clearly show what your firm does and how clients benefit from working with you? Are you proud to send clients and prospects to your website each day knowing that it will provide a positive impression of your firm? Does your website offer features beyond the information in your firm brochure? If you answered “No” to any of these questions, then your firm website needs immediate attention. This is an investment that you can't afford to ignore in today's market.
3. **Office Exterior** – Does your exterior space represent who you are, or want to be, as a firm? It doesn't matter whether you're in a stand-alone building, a high-rise building, or you are working from home, the experience that people have when they arrive at your office is often their first impression of you and your firm. Give some significant thought to how people perceive your space when they pass by it or come in the door. If you don't have control over the exterior of your workplace, then you should examine the experience anyway...is this really the right place for you to be?
4. **Interior Space** – Evaluate what the first impression is like when people come into your office. Are the colors and scent pleasing? Is it clean and well-organized? Is it a comfortable space to be in? What about mints, candy, business cards, and firm brochures or magazines? Do you have a conference room with good technology and guest wi-fi access? Put some thought into your environment and make it a pleasant place for you, your staff, and your clients to be.
5. **Customer Service Host** – This is one of the most important roles in your firm. The wrong person in this position can create a negative impression that casts a cloud across every aspect of your business. Is your Customer Service Host/Receptionist trained to deliver a well-orchestrated client or prospect experience? If not, this is an area to focus on. Start by having your Customer Service Host read about the

fundamentals of *outstanding* customer service and help them to develop a vision of

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