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Client meetings are an integral part of being a great accountant. The most important of these meetings is often when you're tasked with presenting the client with your financial analysis. Making the most of this meeting can do wonders for establishing client trust and retention.

Some points to consider when planning a client visit:

- 1. Do not just provide data and hope your client will be able to interpret it—**especially if you are not meeting with the client to present your [financial analysis](#). Include a written report that explains, in plain language, the metrics most important to the success of that company. And with this narrative summary, length is not the goal; keep it succinct so the client is more likely to read it thoroughly. Using everyday language can help alleviate some of the communication problems associated with interpreting the data and ease the formality of the meeting. Some people are also visual learners, so including charts or graphs alongside the information can help communicate your message more effectively.
- 2. Connect historical financial data with its impact on future company plans.** Brian Hamilton, chairman of Sageworks wrote, "Numbers are not just numbers—they tell a story of how the company is moving towards or away from its strategic objectives." Historical numbers can provide the context needed to look intelligently forward and avoid repeating past mistakes. After all, the only data we have to predict future trends is from analyzing the company's past performances.

Once you prepare the company forecast, you can use [industry data](#) to benchmark

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to ask questions. Then based on their questions (or lack thereof), you can gauge whether or not they are just seeking data or substantive advice to help grow their business. Don't be afraid to ask them if there is more information they would like to know, or simply offer them information on the other services you provide, that could help them.

A lot of times, there is a miscommunication on the services you're able to provide and asking them questions, or informing them about these additional service offerings, is a good way to increase the synergy in the relationship. In relationships where you do become a [trusted business advisor](#), you'll see higher client retention, uncover additional consulting opportunities, and your clients will be much less likely to view your firm as a commodity.

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