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Jessica Ballard • Feb. 22, 2014

Accountants, especially during busy season, have significant demands on their time, so it's critical to understand how to balance a desire to develop **deeper client relationships** and work-related time constraints.

The first step is to recognize that overhauling every client relationship at once is unrealistic and that not all clients are your best clients. Consider clients who are the firm's most valued and valuable as a good starting point to work on deepening relationships.

Aside from gut-based identification of top clients, there are several considerations about who could be good “guinea pigs” for this new relational effort. These include:

- **Receptivity:** Which clients would be most receptive to steps you take to deepen the relationship and to any of the business advisory services eventually provided?
- **Comfort:** With which clients do partners already have a good relationship?
- **Industry niches:** Are there numerous clients in one industry? Focusing on these clients may help develop those relationships more efficiently because of the information overlap and the ability to connect them with peers who might be helpful.
- **Client retention rate:** Each CPA firm can't be everything to every client or potential client, so it's important to know which service offerings are most successful. Where is the firm keeping clients?
- **Lifetime value of a client:** This is essentially the sum of all revenues generated from the firm's service offerings over the lifetime of the client. Reviewing these “A”

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become lifelong clients. After busy season ends, it is important to follow up with these clients. At the same time, re-evaluate clients who were (or are historically) difficult.

Accountants might be tempted to label certain difficult clients as unworthy of the time and effort to cultivate a deeper relationship. Before you do that, consider what Charles H. Green, founder and CEO of consulting firm [Trusted Advisor Associates](#), says on his website: “True psychotics are pretty rare in business.” Behavior that often characterizes difficult clients — indecision, an unwillingness to face facts about critical issues or take the time to gather critical information or involve you in the early stages, or a disrespectful approach — is often driven by fear.

“Truly bad behavior more often than not comes from decent people who are stressed out,” writes Green, the author of [The Trusted Advisor](#) and [Trust Based Selling](#). “If someone is behaving badly, it's a good bet that they are afraid — of losing something they have, or of not getting something they want. If you can identify that fear, then you can replace demonization with a real problem statement — a far more productive approach. If, further, you can talk about that fear with your client, you will create a lasting bond that can serve you both well.”

Consider how to transform relationships with “difficult” clients by identifying those fears and how you can help. In other words, how can you be valuable to the client so they can become more valuable to the accounting practice.

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